Electronic Change in Source of Funds

Version Date: December 6, 2021

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Electronic Change in Source of Funds

The electronic personnel action form for change in source of funds will apply to both prospective and retroactive changes.

Purpose:

The electronic change in source of funds (CSOF) will phase out the paper form PER 3 previously used to transfer salary expenses from one project to another. This will be used for both retroactive and prospective changes in salary distribution between and among projects.

For the full policy of what is required for CSOF when sponsored projects are involved, please see **Cost Transfer Policy**. The Cost Transfer form is still required in certain circumstances, and must be completed and its supporting materials uploaded into PeopleSoft using CSOF.

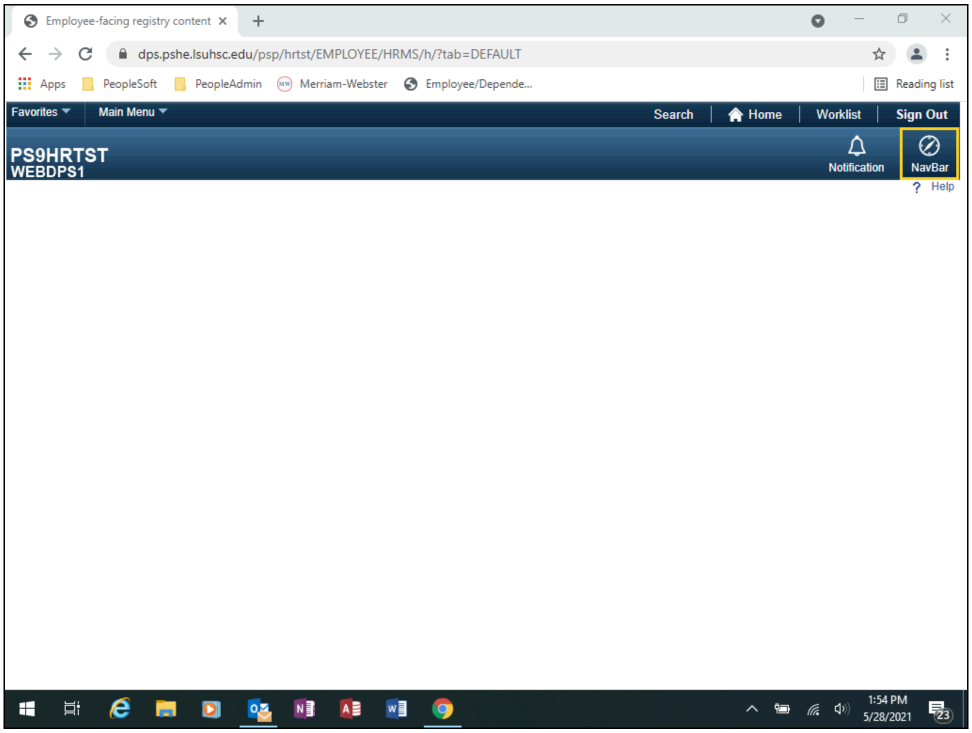
NOTE: Prospective and Retroactive Changes in Source of Funds (CSOF) functions may be used for both sponsored and non-sponsored projects.

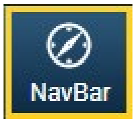
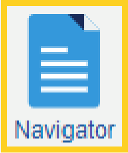
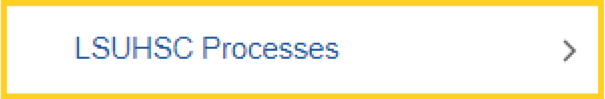
Enter Prospective Change in Source of Funds

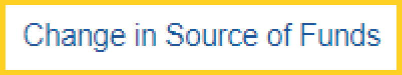
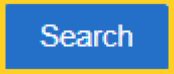
Procedure

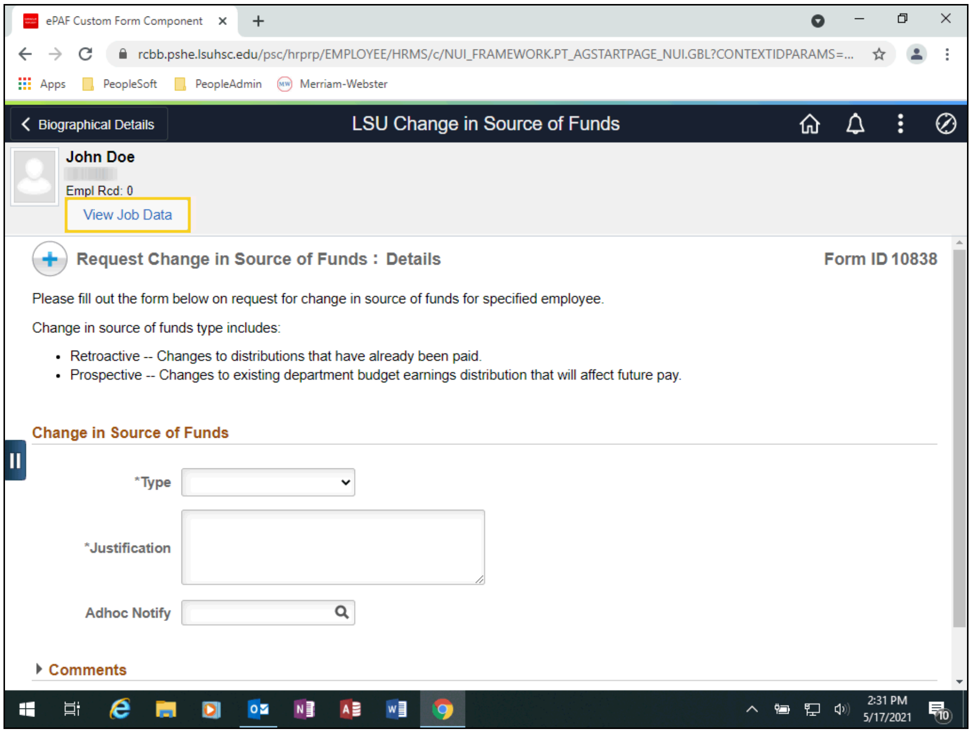
In this topic you will learn how to **Enter Prospective Change in Source of Funds**.

Step	Action
1.	The **Prospective** process transfers funds to be paid to the employee for work performed on an award. Prospective requests can only be submitted prior to on-cycle payroll being run. ***NOTE: If the on-cycle payroll has been run, request will become a Retro rather than a Prospective.***
2.	***NOTE: You cannot submit a new form for an employee with an outstanding (Pending) funding change form for either Prospective or Retro. The system will only allow one (1) pending Prospective and one (1) Retroactive PER.***


Employee-facing registry content
dps.pshe.lsuhsc.edu/psp/hrtst/EMPLOYEE/HRMS/h/?tab=DEFAULT
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Favorites
Main Menu
Search
Home
Worklist
Sign Out
PS9HRTST
WEBDPS1
Notification
NavBar
Help
1:54 PM
5/28/2021

Step	Action
3.	Click the **NavBar** button. 
4.	Click the **Navigator** button. 
5.	Click the **Down** scrollbar.
6.	Click the **LSUHSC Processes** menu.  LSUHSC Processes

Step	Action
7.	Click the **Change in Source of Funds** menu.  Change in Source of Funds
8.	Row level security is based on both the employee's "Home" and "Funding" department. From the **Search By** list, you will be able to select the employee for your PER. ***For training purposes only, you will use Empl ID 0000000.*** Enter the desired information into the **Empl ID** field. Enter "**0000000**".
9.	Click the **Search** button.  Search


ePAF Custom Form Component
rcbb.pshe.lsuhsc.edu/psc/hrprp/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Biographical Details

LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0
View Job Data

Request Change in Source of Funds : Details

Form ID 10838

Please fill out the form below on request for change in source of funds for specified employee.

Change in source of funds type includes:

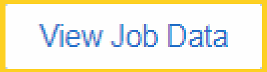
- Retroactive -- Changes to distributions that have already been paid.
- Prospective -- Changes to existing department budget earnings distribution that will affect future pay.

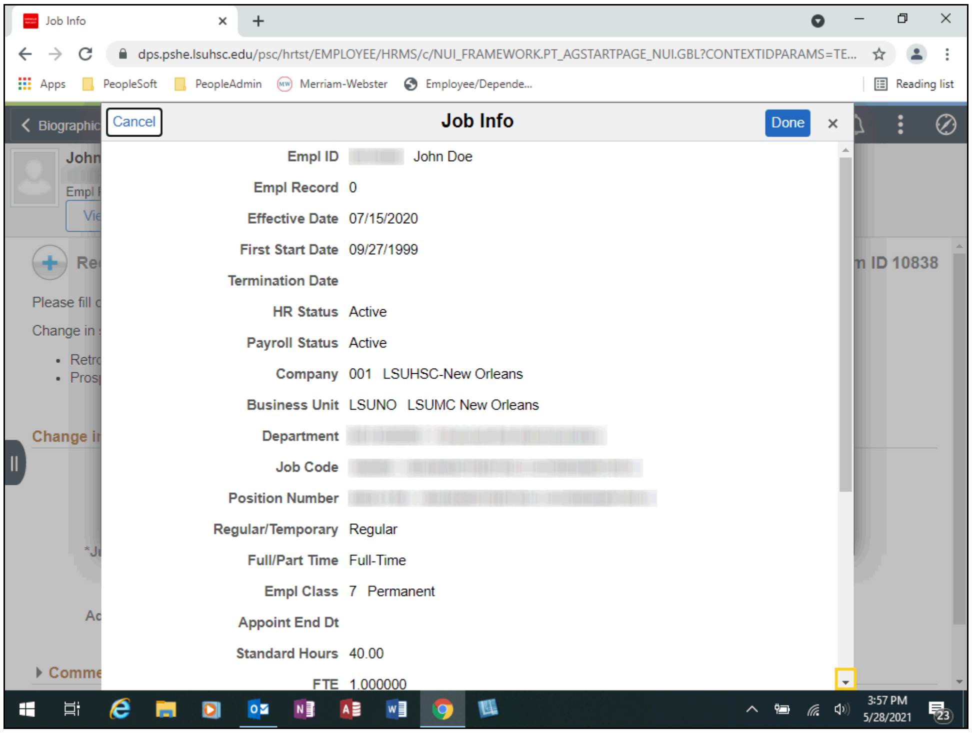
Change in Source of Funds

*Type
*Justification
Adhoc Notify

Comments

2:31 PM
5/17/2021

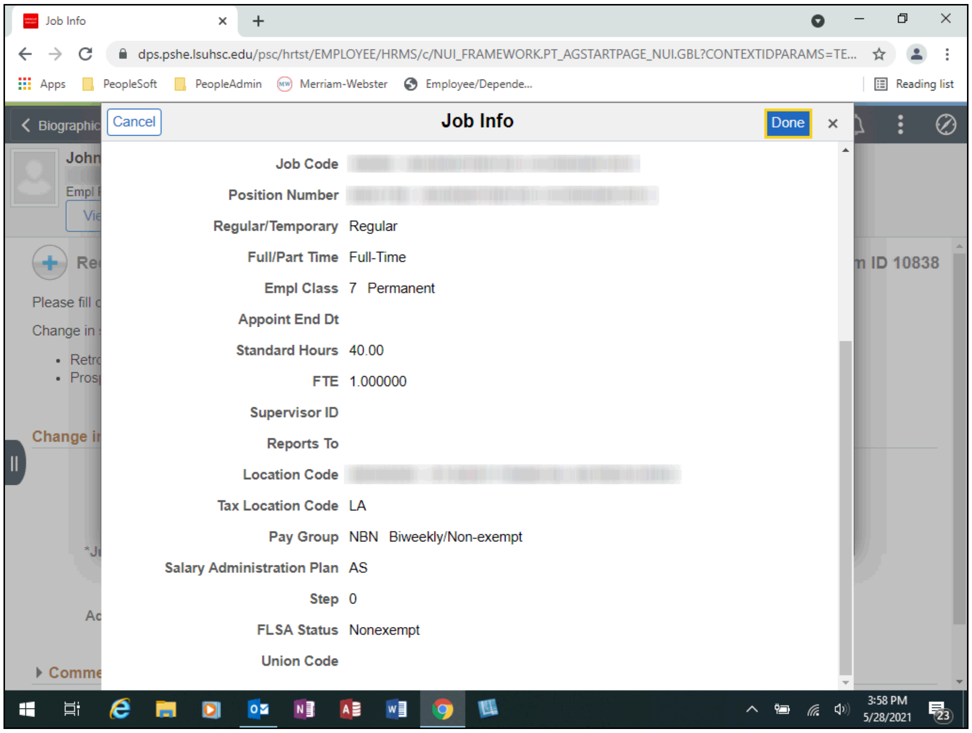
Step	Action
10.	The **Request Change in Source of Funds: Details** page displays. Click the **View Job Data** button.  View Job Data


Job Info
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Cancel
Done
3:57 PM
5/28/2021

Job Info

Empl ID [redacted] John Doe
Empl Record 0
Effective Date 07/15/2020
First Start Date 09/27/1999
Termination Date
HR Status Active
Payroll Status Active
Company 001 LSUHSC-New Orleans
Business Unit LSUNO LSUMC New Orleans
Department [redacted]
Job Code [redacted]
Position Number [redacted]
Regular/Temporary Regular
Full/Part Time Full-Time
Empl Class 7 Permanent
Appoint End Dt
Standard Hours 40.00
FTE 1.000000

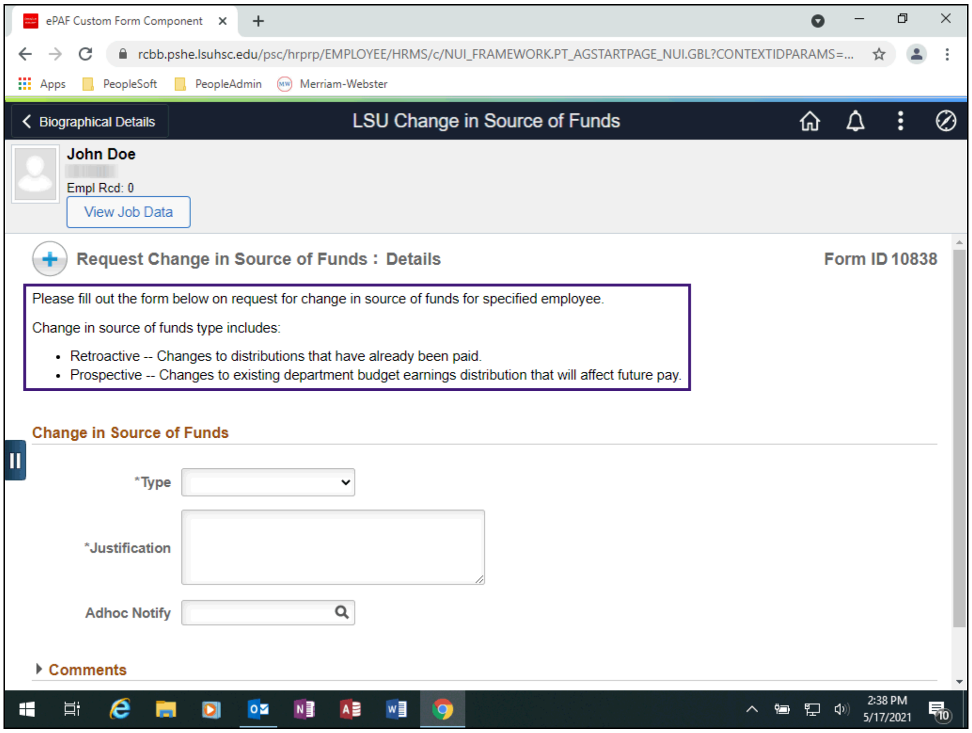
Step	Action
11.	You can review the employee's current information on the *Job Info* page. Click the **Down** scrollbar.


Job Info
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Biographic
Cancel
Done
3:58 PM
5/28/2021

Job Info

Job Code	[redacted]
Position Number	[redacted]
Regular/Temporary	Regular
Full/Part Time	Full-Time
Empl Class	7 Permanent
Appoint End Dt	
Standard Hours	40.00
FTE	1.000000
Supervisor ID	
Reports To	
Location Code	[redacted]
Tax Location Code	LA
Pay Group	NBN Biweekly/Non-exempt
Salary Administration Plan	AS
Step	0
FLSA Status	Nonexempt
Union Code	

Step	Action
12.	You can review the employee's current information on the *Job Info* page. Click the **Done** button. Done


ePAF Custom Form Component
rcbb.pshe.lsuhsc.edu/psc/hrprp/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Biographical Details
View Job Data
Comments
2:38 PM
5/17/2021

LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0

Request Change in Source of Funds : Details

Form ID 10838

Please fill out the form below on request for change in source of funds for specified employee.

Change in source of funds type includes:

- Retroactive -- Changes to distributions that have already been paid.
- Prospective -- Changes to existing department budget earnings distribution that will affect future pay.

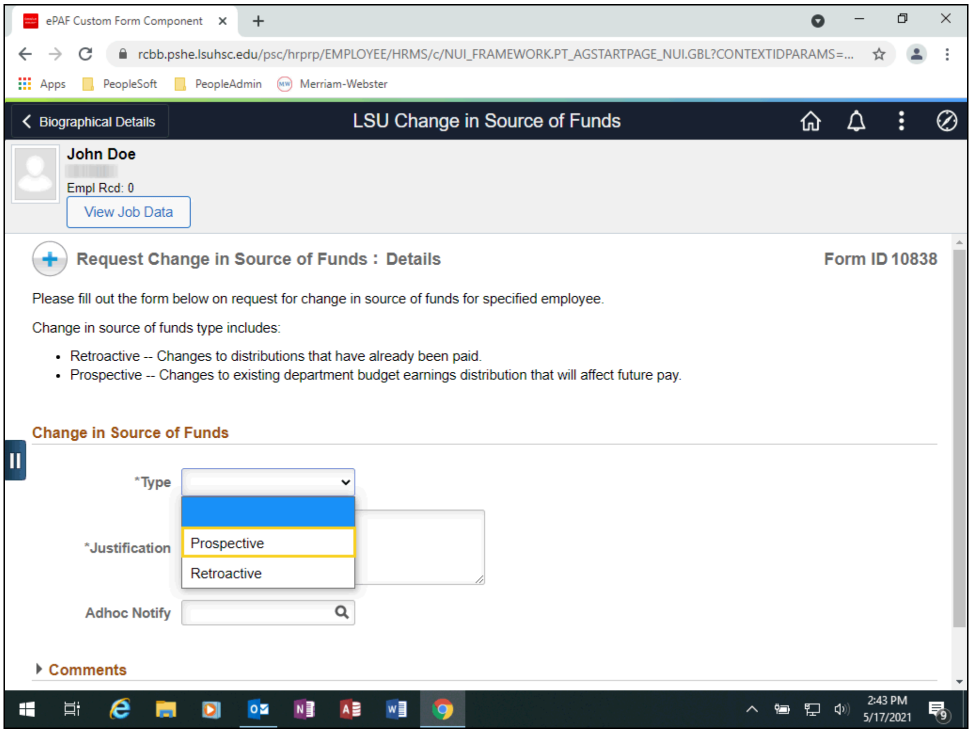
Change in Source of Funds

*Type

*Justification

Adhoc Notify

Step	Action
13.	**Instruction Text** This text will only be displayed on initial form request. Approvers and viewers will not see this text.
14.	Click the button to the right of the **Type** field. ⌄



ePAF Custom Form Component
rcbb.pshe.lsuhsc.edu/psc/hrprp/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Biographical Details
LSU Change in Source of Funds
View Job Data
2:43 PM
5/17/2021

John Doe
[redacted]
Empl Rcd: 0

Request Change in Source of Funds : Details

Form ID 10838

Please fill out the form below on request for change in source of funds for specified employee.

Change in source of funds type includes:

- Retroactive -- Changes to distributions that have already been paid.
- Prospective -- Changes to existing department budget earnings distribution that will affect future pay.

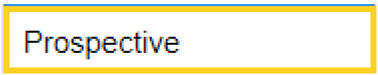
Change in Source of Funds

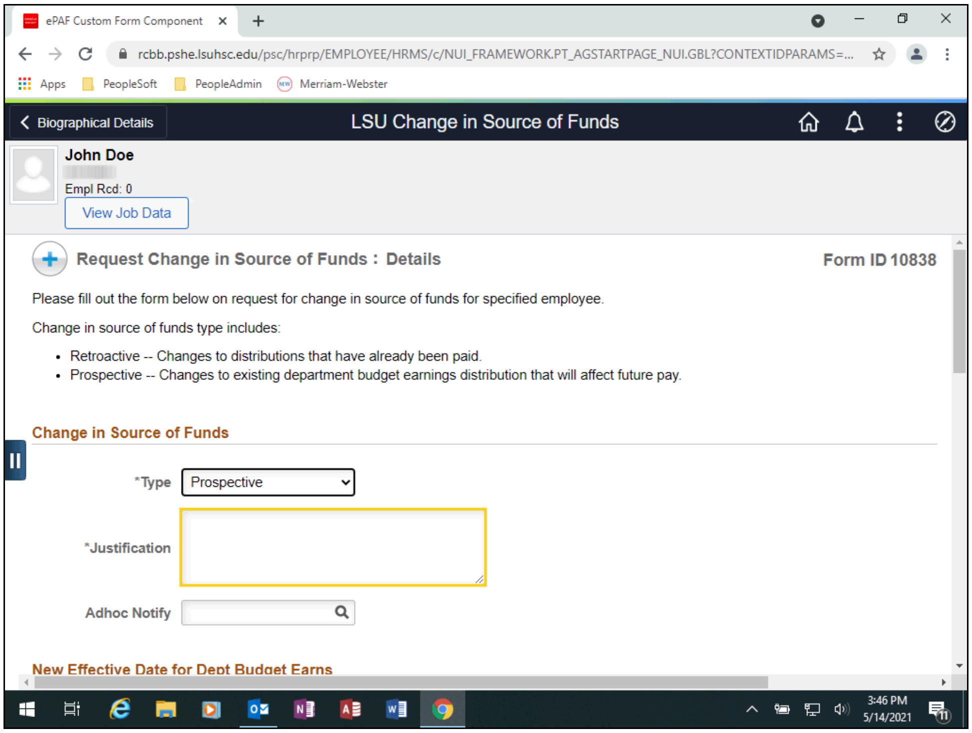
*Type
Prospective
Retroactive

*Justification

Adhoc Notify

Comments

Step	Action
15.	**Type** There are two *Types* of Change in Source of Funds: **Prospective -** Updates department budget earnings with specified distributions changes and Effective Date. **Retroactive -** The process to transfer funds that were already paid to the employee and the project needs to be changed retroactively. Click the **Prospective** list item.  Prospective


ePAF Custom Form Component
rcbb.pshe.lsuhsc.edu/psc/hrprp/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Biographical Details
View Job Data
3:46 PM
5/14/2021

LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0

Request Change in Source of Funds : Details

Form ID 10838

Please fill out the form below on request for change in source of funds for specified employee.

Change in source of funds type includes:

- Retroactive -- Changes to distributions that have already been paid.
- Prospective -- Changes to existing department budget earnings distribution that will affect future pay.

Change in Source of Funds

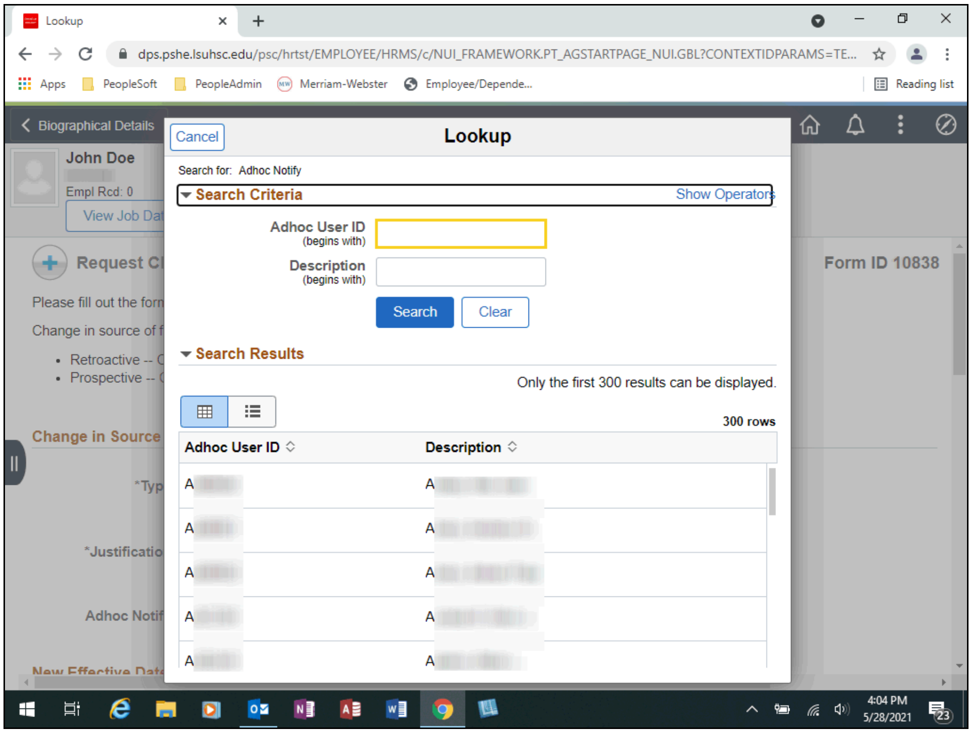
*Type: Prospective

*Justification:

Adhoc Notify:

New Effective Date for Dept Budget Earns

Step	Action
16.	**Justification** The *Justification* field is a free form text field. Here you will enter the reason (e.g., opened new contract, transfer to state fund account, etc.) for initiating the PER. Enter the desired information into the ***Justification** field. Enter "**Test**".
17.	**Adhoc Notify** Use the *Adhoc Notify* field to send an additional notification (e.g., employee you are adjusting, Principal Investigator, etc.) after all approvals have been completed. ***NOTE: Only a person allowed access to the PeopleSoft HCM system will be able to receive Adhoc notifications. An Adhoc user can only view information if they have security access for the employee's home department.*** Click the **Look up Adhoc Notify** button.
18.	Click the **Search Criteria** button.


Lookup
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Biographical Details
John Doe
Empl Rcd: 0
View Job Dat
Request C
Please fill out the forn
Change in source of f
Retroactive -- C
Prospective -- C
Change in Source
*Typ
*Justificatio
Adhoc Notif
New Effective Date
Form ID 10838
Cancel
Show Operators
4:04 PM
5/28/2021

Lookup

Search for: Adhoc Notify

Search Criteria

Adhoc User ID (begins with):

Description (begins with):

Search Clear

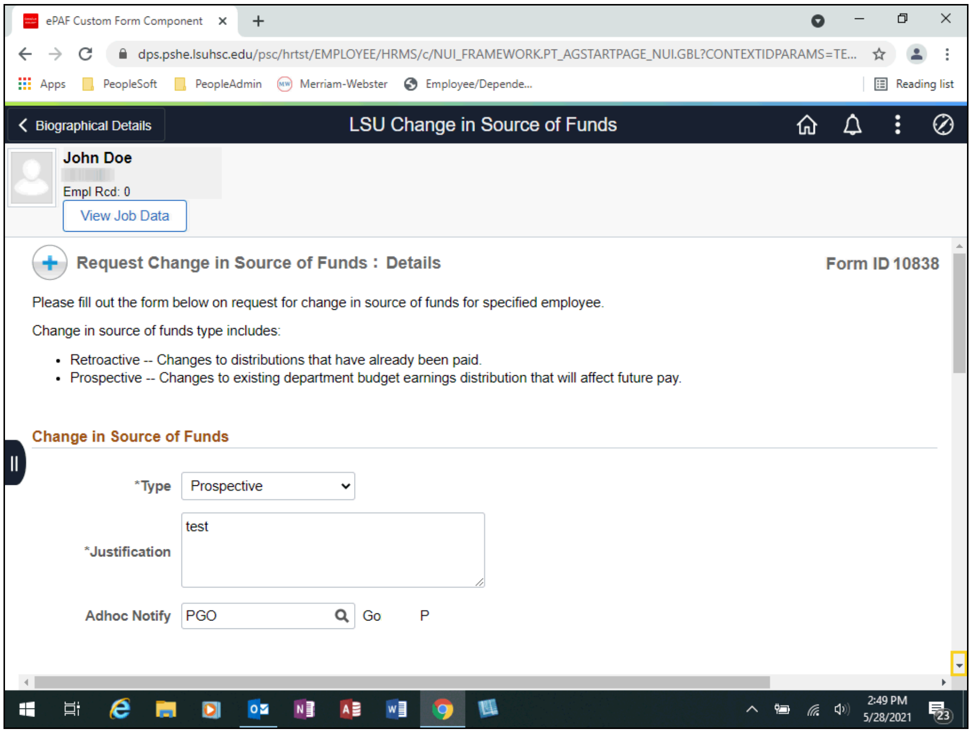
Search Results

Only the first 300 results can be displayed.

300 rows

Adhoc User ID	Description
A[redacted]	A[redacted]
A[redacted]	A[redacted]
A[redacted]	A[redacted]
A[redacted]	A[redacted]
A[redacted]	A[redacted]

Step	Action
19.	Use the *Adhoc User ID* to search by Empl ID. Use the *Description* field to search by Last Name. ***For training purposes only, you will use "pgo" to search for the Adhoc User ID.*** Enter the desired information into the **Adhoc User ID** field. Enter "**pgo**".
20.	Click the **Search** button. Search
21.	Click in the **Go, P** field. PGO



ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Biographical Details
LSU Change in Source of Funds
View Job Data
Go
P
2:49 PM
5/28/2021

John Doe

Empl Rcd: 0

Request Change in Source of Funds : Details

Form ID 10838

Please fill out the form below on request for change in source of funds for specified employee.

Change in source of funds type includes:

- Retroactive -- Changes to distributions that have already been paid.
- Prospective -- Changes to existing department budget earnings distribution that will affect future pay.

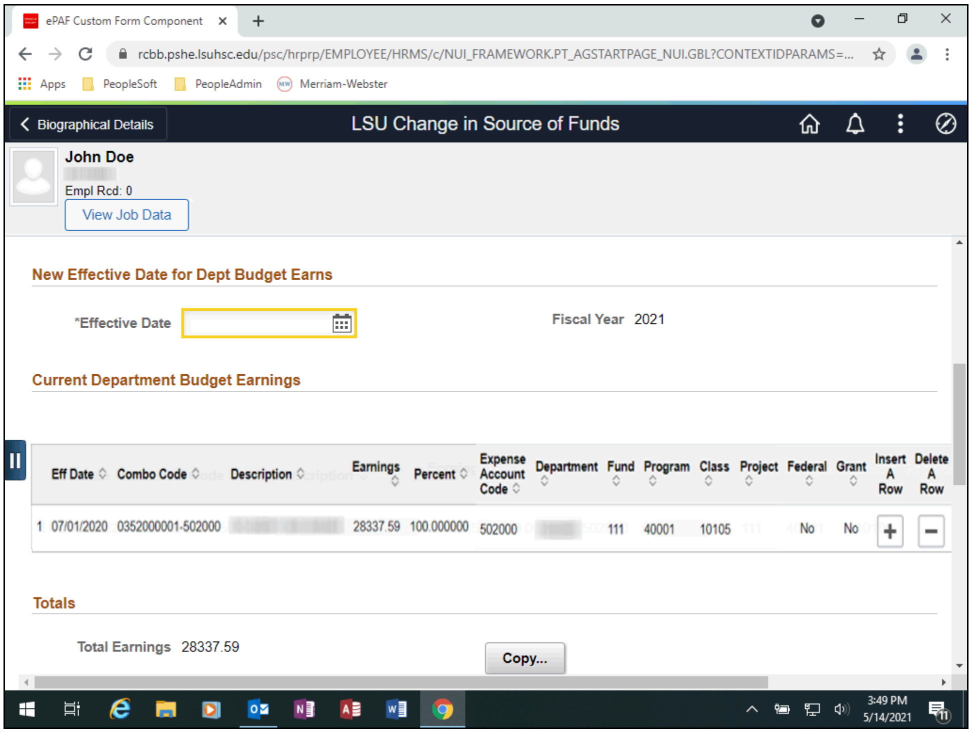
Change in Source of Funds

*Type: Prospective

*Justification: test

Adhoc Notify: PGO

Step	Action
22.	Click the **Down** scrollbar.


ePAF Custom Form Component
rcbb.pshe.lsuhsc.edu/psc/hrprp/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Biographical Details
LSU Change in Source of Funds
View Job Data
Copy...
3:49 PM
5/14/2021

John Doe
[redacted]
Empl Rcd: 0

New Effective Date for Dept Budget Earns

*Effective Date

Fiscal Year 2021

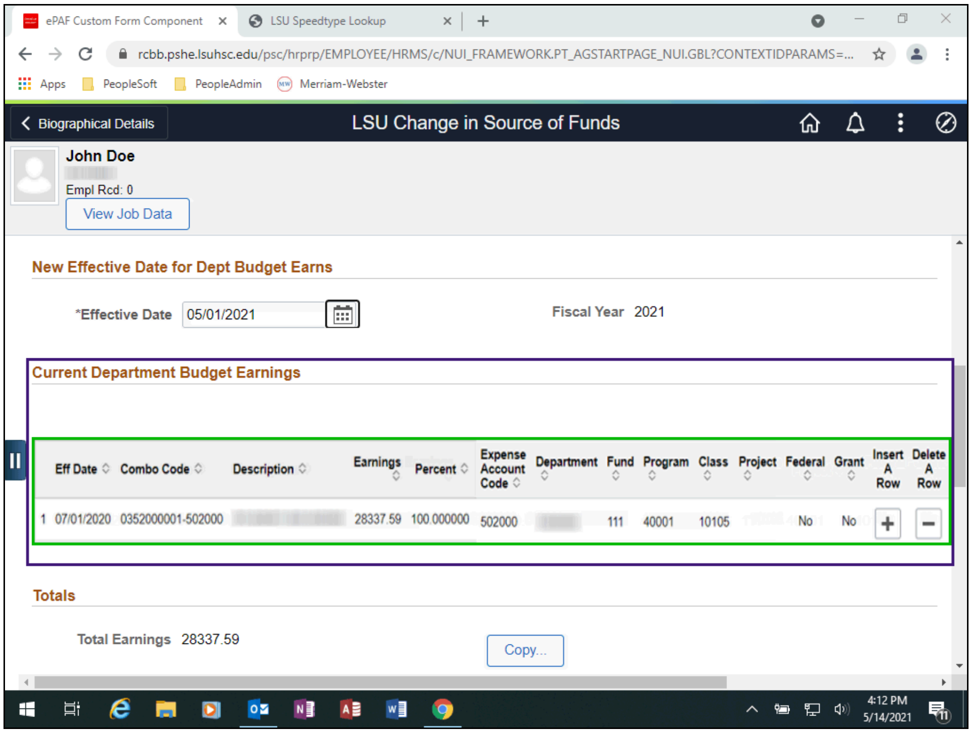
Current Department Budget Earnings

	Eff Date	Combo Code	Description	Earnings	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant	Insert A Row	Delete A Row
1	07/01/2020	0352000001-502000	[redacted]	28337.59	100.000000	502000	[redacted]	111	40001	10105		No	No	+	−

Totals

Total Earnings 28337.59

Step	Action
23.	**Effective Date** The *Effective Date* (EFFDT) is the date the change will begin to be used. The *Effective Date* must be greater than the current department budget earnings EFFDT, and must be greater than the last on-cycle payroll end date. Enter the desired information into the ***Effective Date** field. Enter "**011521**" for training purposes only.



ePAF Custom Form Component
LSU Speedtype Lookup
rcbb.pshe.lsuhsc.edu/psc/hrprp/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Biographical Details
LSU Change in Source of Funds
View Job Data
Copy...
4:12 PM
5/14/2021

John Doe
[redacted]
Empl Rcd: 0

New Effective Date for Dept Budget Earns

*Effective Date 05/01/2021

Fiscal Year 2021

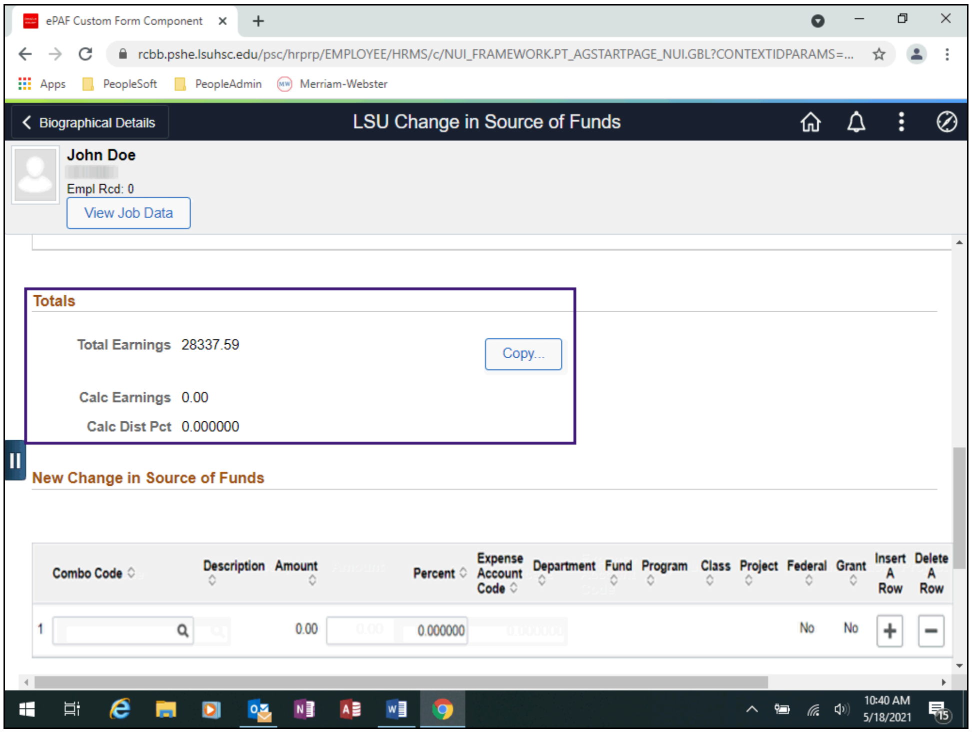
Current Department Budget Earnings

	Eff Date	Combo Code	Description	Earnings	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant	Insert A Row	Delete A Row
1	07/01/2020	0352000001-502000	[redacted]	28337.59	100.000000	502000	[redacted]	111	40001	10105		No	No	+	−

Totals

Total Earnings 28337.59

Step	Action
24.	**Current Department Budget Earnings** The *Current Department Budget Earnings* field is display only. It lists the following: • The employee's current department budget earnings • Earnings is derived from annual rate with percentage distribution
25.	Click the **Down** scrollbar.


ePAF Custom Form Component
rcbb.pshe.lsuhsc.edu/psc/hrprp/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Biographical Details
10:40 AM
5/18/2021

LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0
View Job Data

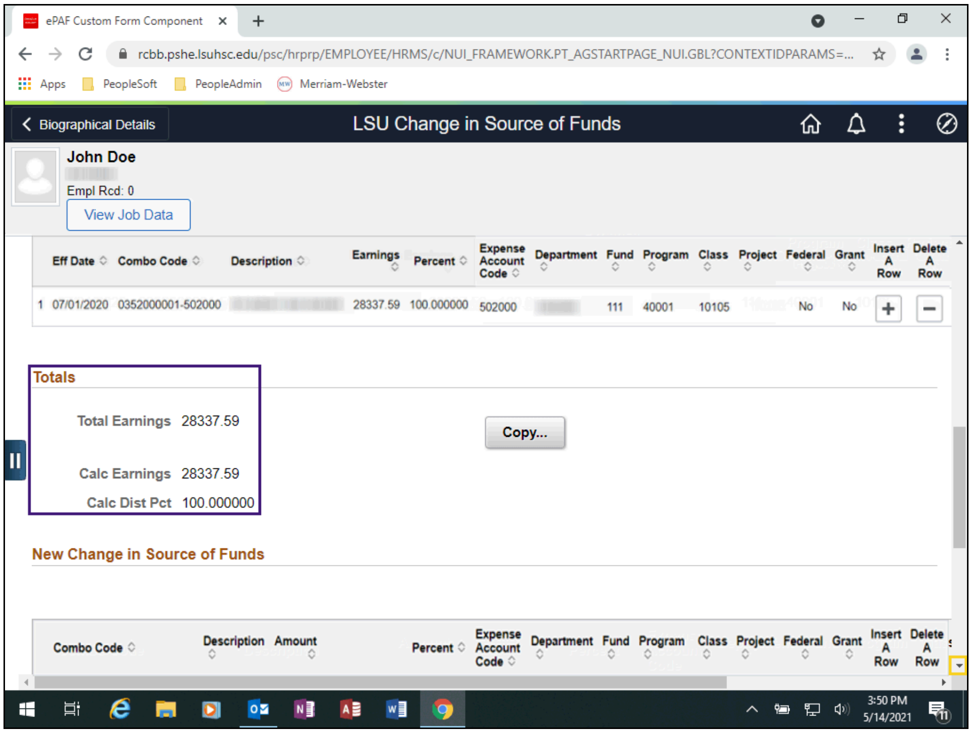
Totals

Total Earnings 28337.59
Copy...
Calc Earnings 0.00
Calc Dist Pct 0.000000

New Change in Source of Funds

	Combo Code	Description	Amount	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant	Insert A Row	Delete A Row
1			0.00	0.000000							No	No	+	−

Step	Action
26.	**Totals** • **Total Earnings** – total amount of current distributions • **Calc Dist Pct** – total percentage of new distributions (used for Prospective changes)
27.	**Copy** Copy is an optional feature. It copies the current distributions into the “New Change in Source of Funds” grid. ***NOTE: If copying the current earnings is not helpful, do not use the copy feature.*** ***NOTE: If you have multiple distribution lines, users may find it helpful to use the copy feature. Users can then delete the distribution lines not needed under the New Source of Funds grid.***
28.	Click the **Copy...** button. Copy...



ePAF Custom Form Component
rcbb.pshe.lsuhsc.edu/psc/hrprp/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Biographical Details
LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0
View Job Data

	Eff Date	Combo Code	Description	Earnings	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant	Insert A Row	Delete A Row
1	07/01/2020	0352000001-502000	[redacted]	28337.59	100.000000	502000	[redacted]	111	40001	10105		No	No	+	−

Totals

Total Earnings 28337.59

Calc Earnings 28337.59

Calc Dist Pct 100.000000

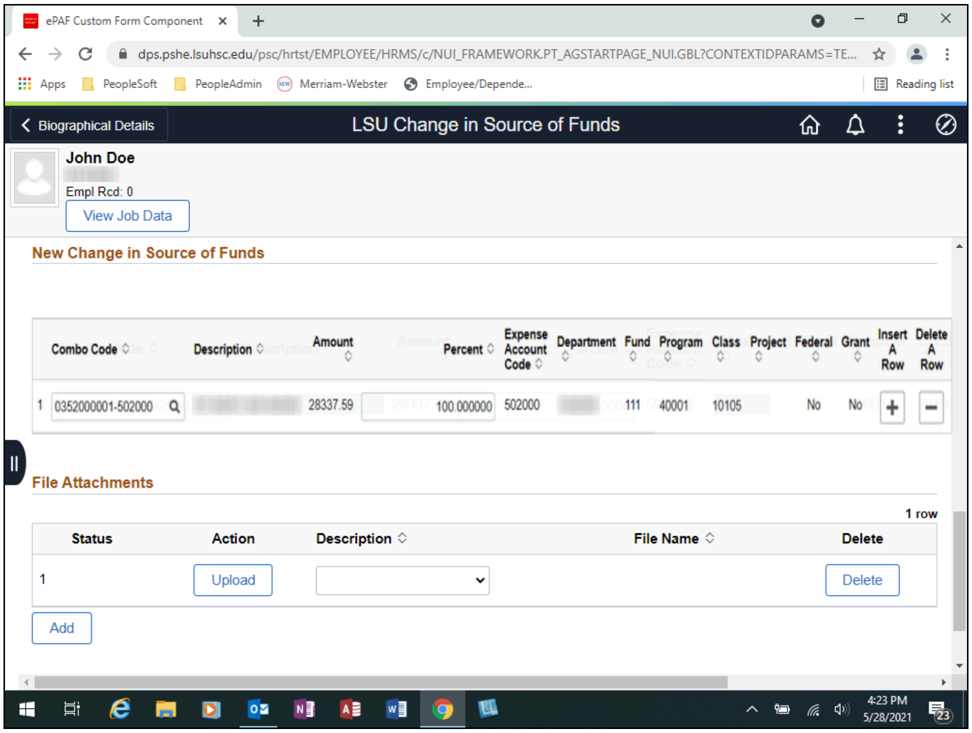
Copy...

New Change in Source of Funds

Combo Code	Description	Amount	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant	Insert A Row	Delete A Row

3:50 PM
5/14/2021

Step	Action
29.	The ***Totals*** section displays the employee's current *Total Earnings* and *Calc Dist Pct.* ***NOTE: Percentages must equal 100%. An error message will be received if the percentages do not total 100%.*** Click the **Down** scrollbar. ▼


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Biographical Details
LSU Change in Source of Funds
View Job Data
Upload
Delete
Add
4:23 PM
5/28/2021

John Doe
[redacted]
Empl Rcd: 0

New Change in Source of Funds

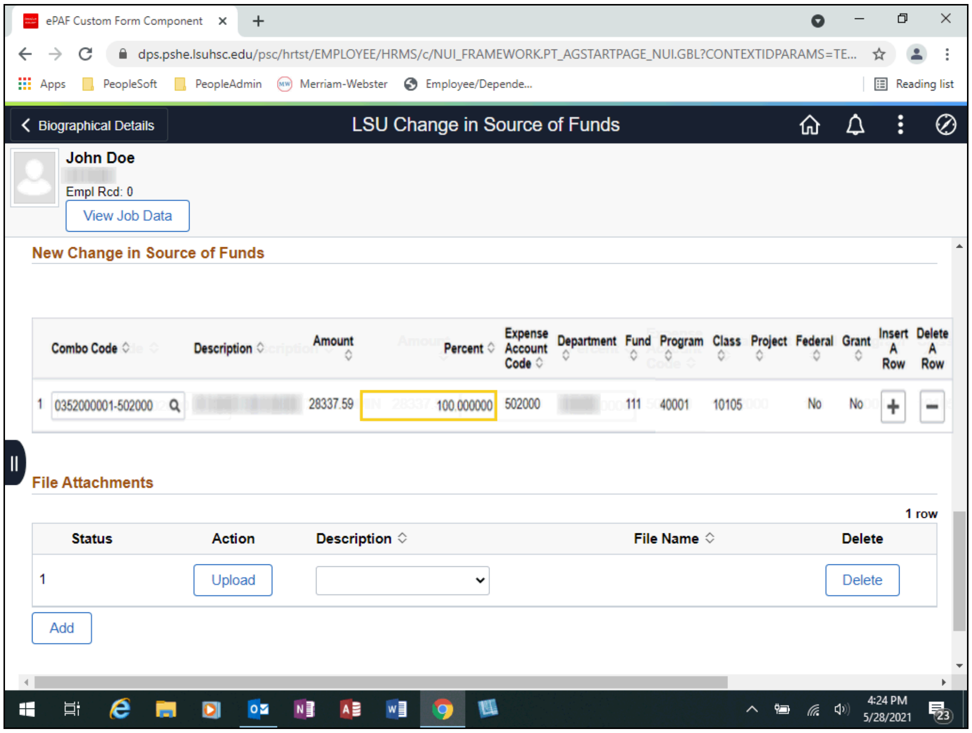
	Combo Code	Description	Amount	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant	Insert A Row	Delete A Row
1	0352000001-502000	[redacted]	28337.59	100.000000	502000	[redacted]	111	40001	10105		No	No	+	−

File Attachments

1 row

	Status	Action	Description	File Name	Delete
1		Upload			Delete

Step	Action
30.	**Exercise** You will change the current **Percent** from *100* to *85*. A new row will be added and the *Project ID 5352000001* will be used to search for the **Combo Code 5352000001-502000**. The **Percent** for the new row will be *10*. ***NOTE: No line item under the New Source of Funds should = 0. It can cause potential errors, especially if it is a closed grant.***


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Biographical Details
LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0

View Job Data

New Change in Source of Funds

	Combo Code	Description	Amount	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant	Insert A Row	Delete A Row
1	0352000001-502000	[redacted]	28337.59	100.000000	502000	[redacted]	111	40001	10105		No	No	+	−

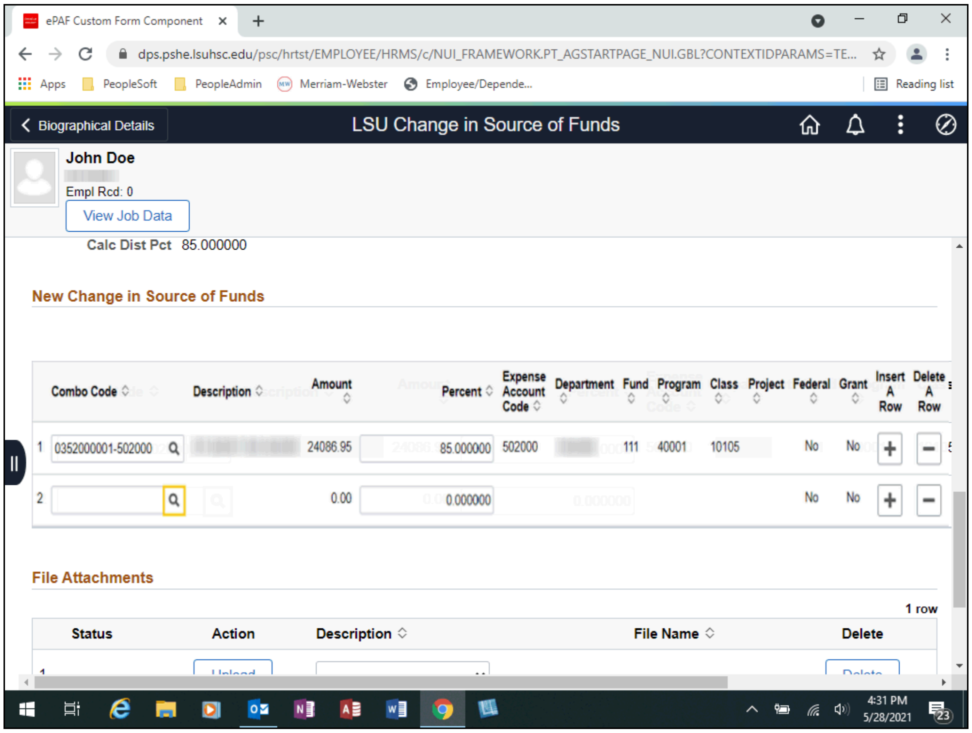
File Attachments

1 row

	Status	Action	Description	File Name	Delete
1		Upload			Delete

Add
4:24 PM
5/28/2021

Step	Action
31.	Enter the desired information into the **Percent** field. Enter "**85**".
32.	Click the **Add a New Row** button. ***NOTE: Use the Delete a Row (-) option to delete any distribution lines not needed.*** +


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Biographical Details
View Job Data
4:31 PM
5/28/2021

LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0

Calc Dist Pct 85.000000

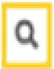
New Change in Source of Funds

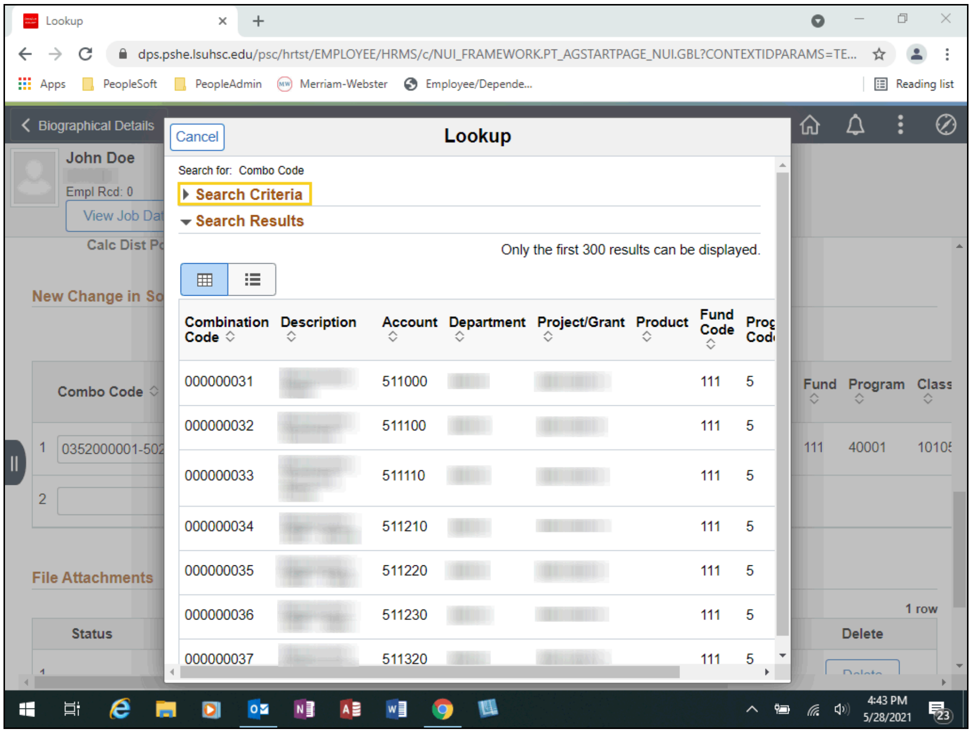
	Combo Code	Description	Amount	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant	Insert A Row	Delete A Row
1	0352000001-502000	[redacted]	24086.95	85.000000	502000	[redacted]	111	40001	10105		No	No	+	−
2			0.00	0.000000							No	No	+	−

File Attachments

1 row

Status	Action	Description	File Name	Delete
1	Upload			Delete

Step	Action
33.	The **Combo Code** is a project number with an account code. If you should use an incorrect **Combo Code**, an *error message* will display. *Error messages* will also display if the project is out of date range. The **Project/Grant** cannot be used beyond its budget period. ***NOTE: If a Combo Code does not exist, please contact Sponsored Projects for Sponsored Awards, Billing A/R for contracts, and General Accounting for Residual Balances and SGF projects.*** Click the **Look up Combo Code** button. 


Lookup
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Biographical Details
John Doe
Empl Rcd: 0
View Job Dat
Calc Dist Po
New Change in So
Combo Code
0352000001-502
File Attachments
Status
Fund
Program
Class
111
40001
1010
1 row
Delete
Cancel
4:43 PM
5/28/2021

Lookup

Search for: Combo Code

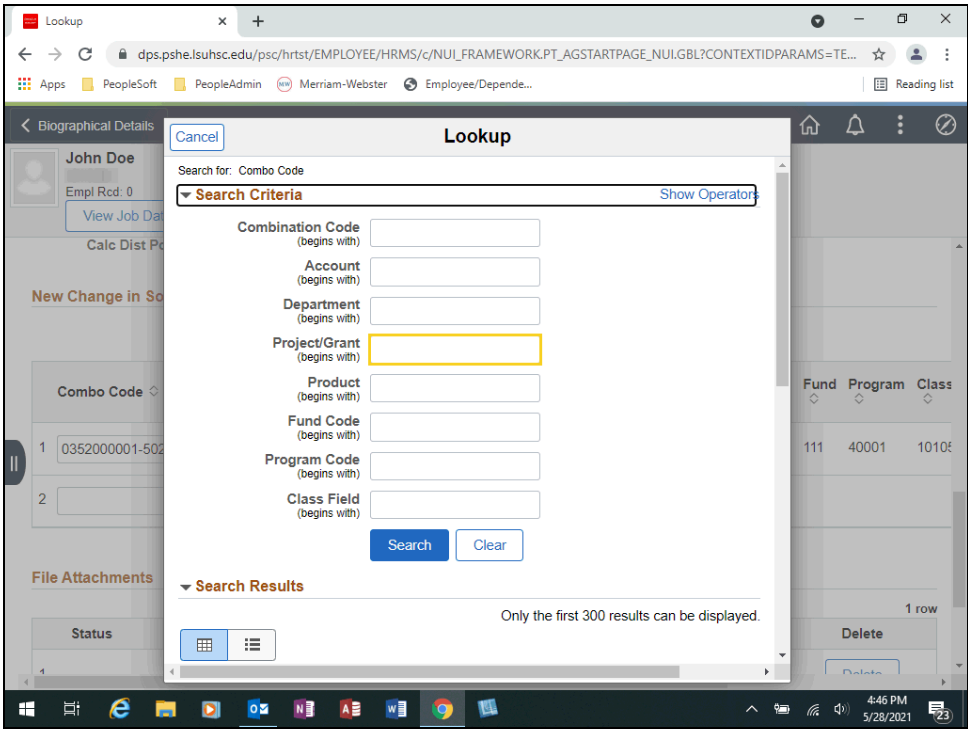
▸ Search Criteria

▾ Search Results

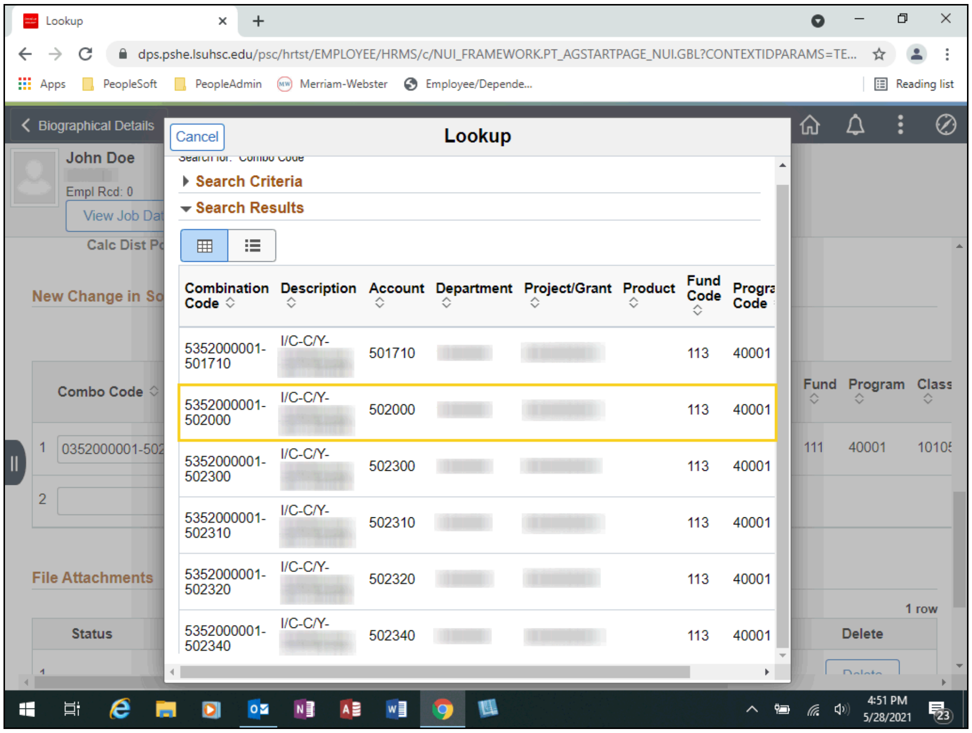
Only the first 300 results can be displayed.

Combination Code	Description	Account	Department	Project/Grant	Product	Fund Code	Prog Cod
000000031	[redacted]	511000	[redacted]	[redacted]		111	5
000000032	[redacted]	511100	[redacted]	[redacted]		111	5
000000033	[redacted]	511110	[redacted]	[redacted]		111	5
000000034	[redacted]	511210	[redacted]	[redacted]		111	5
000000035	[redacted]	511220	[redacted]	[redacted]		111	5
000000036	[redacted]	511230	[redacted]	[redacted]		111	5
000000037	[redacted]	511320	[redacted]	[redacted]		111	5

Step	Action
34.	Click the **Search Criteria** button. ▸ Search Criteria

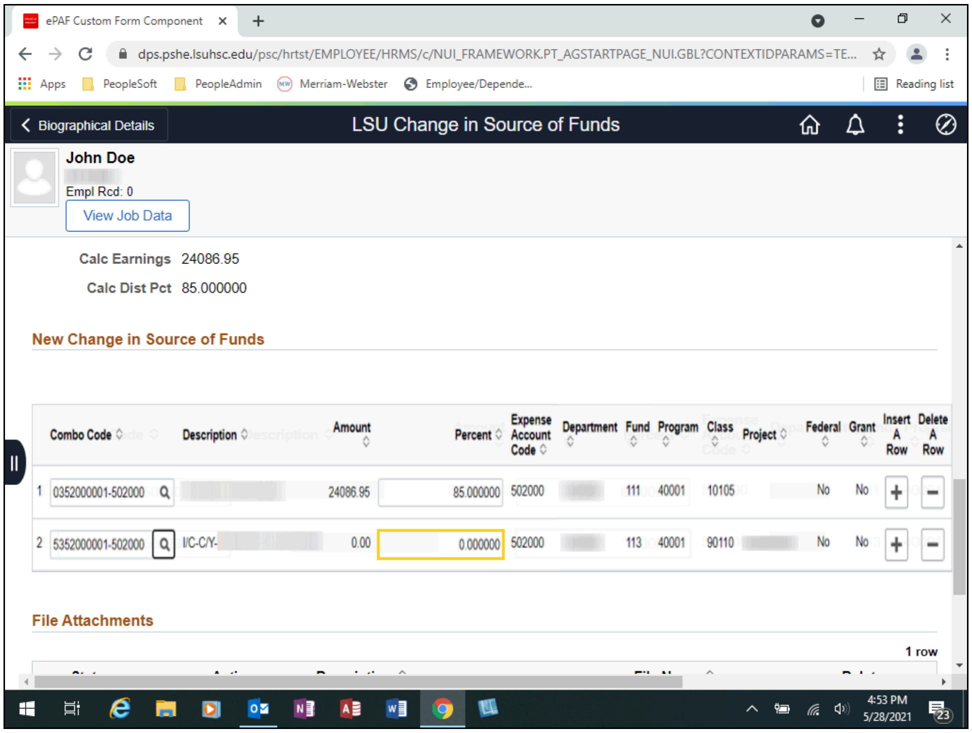

Lookup
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Biographical Details
John Doe
Empl Rcd: 0
View Job Dat
Calc Dist Po
New Change in So
Combo Code
1
0352000001-502
2
File Attachments
Status
Fund
Program
Class
111
40001
1010
1 row
Delete
Cancel
Lookup
Search for: Combo Code
Search Criteria
Show Operators
Combination Code (begins with)
Account (begins with)
Department (begins with)
Project/Grant (begins with)
Product (begins with)
Fund Code (begins with)
Program Code (begins with)
Class Field (begins with)
Search
Clear
Search Results
Only the first 300 results can be displayed.
4:46 PM
5/28/2021

Step	Action
35.	Enter the desired information into the **Project/Grant** field. Enter "**5352000001**".
36.	Click the **Search** button.
37.	Click the **Down** scrollbar.


Lookup
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Biographical Details
John Doe
Empl Rcd: 0
View Job Data
Calc Dist Po
New Change in So
Combo Code
0352000001-502
File Attachments
Status
Fund
Program
Class
111
40001
10105
1 row
Delete
Cancel
Lookup
Search for: Combo Code
Search Criteria
Search Results
4:51 PM
5/28/2021

Combination Code	Description	Account	Department	Project/Grant	Product	Fund Code	Progra Code
5352000001-501710	I/C-C/Y- [redacted]	501710	[redacted]	[redacted]		113	40001
5352000001-502000	I/C-C/Y- [redacted]	502000	[redacted]	[redacted]		113	40001
5352000001-502300	I/C-C/Y- [redacted]	502300	[redacted]	[redacted]		113	40001
5352000001-502310	I/C-C/Y- [redacted]	502310	[redacted]	[redacted]		113	40001
5352000001-502320	I/C-C/Y- [redacted]	502320	[redacted]	[redacted]		113	40001
5352000001-502340	I/C-C/Y- [redacted]	502340	[redacted]	[redacted]		113	40001

Step	Action
38.	Click in the **5352000001-502000** field.



ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Biographical Details
LSU Change in Source of Funds
View Job Data
4:53 PM
5/28/2021

John Doe
[redacted]
Empl Rcd: 0

Calc Earnings 24086.95
Calc Dist Pct 85.000000

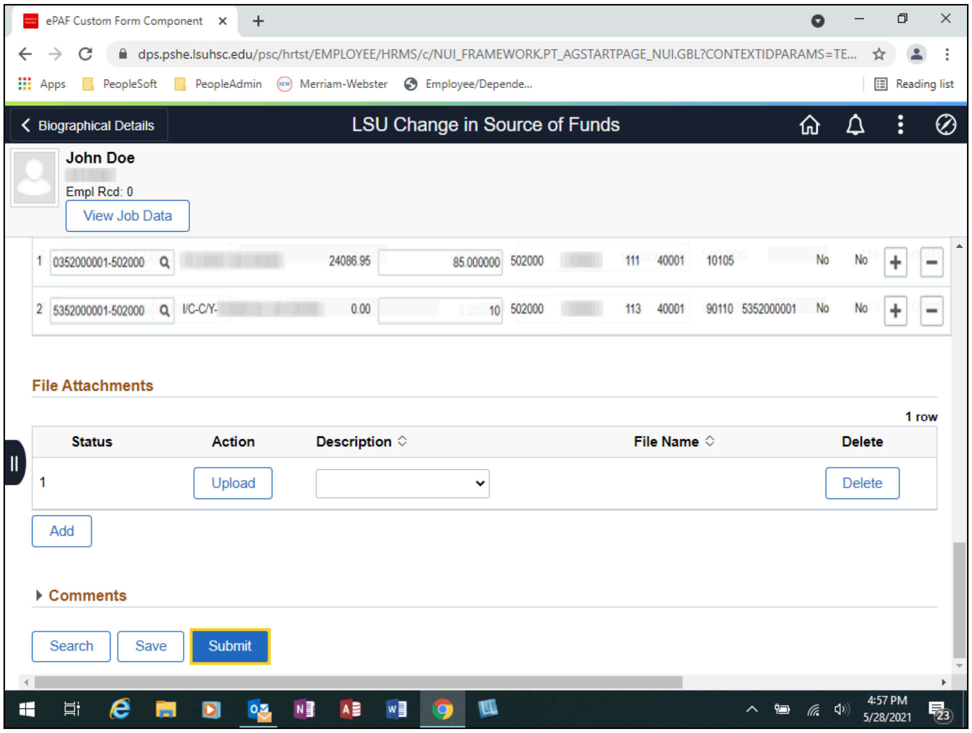
New Change in Source of Funds

	Combo Code	Description	Amount	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant	Insert A Row	Delete A Row
1	0352000001-502000	[redacted]	24086.95	85.000000	502000	[redacted]	111	40001	10105		No	No	+	−
2	5352000001-502000	I/C-C/Y-[redacted]	0.00	0.000000	502000	[redacted]	113	40001	90110	[redacted]	No	No	+	−

File Attachments

1 row

Step	Action
39.	Enter the desired information into the **Percent** field. Enter "**10**".
40.	Click the **Down** scrollbar. ▼


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Biographical Details
LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0
View Job Data

1	0352000001-502000	[redacted]	24086.95	85.000000	502000	[redacted]	111	40001	10105		No	No	+	−
2	5352000001-502000	I/C-C/Y-[redacted]	0.00	10	502000	[redacted]	113	40001	90110	5352000001	No	No	+	−

File Attachments

1 row

Status	Action	Description	File Name	Delete
1	Upload			Delete

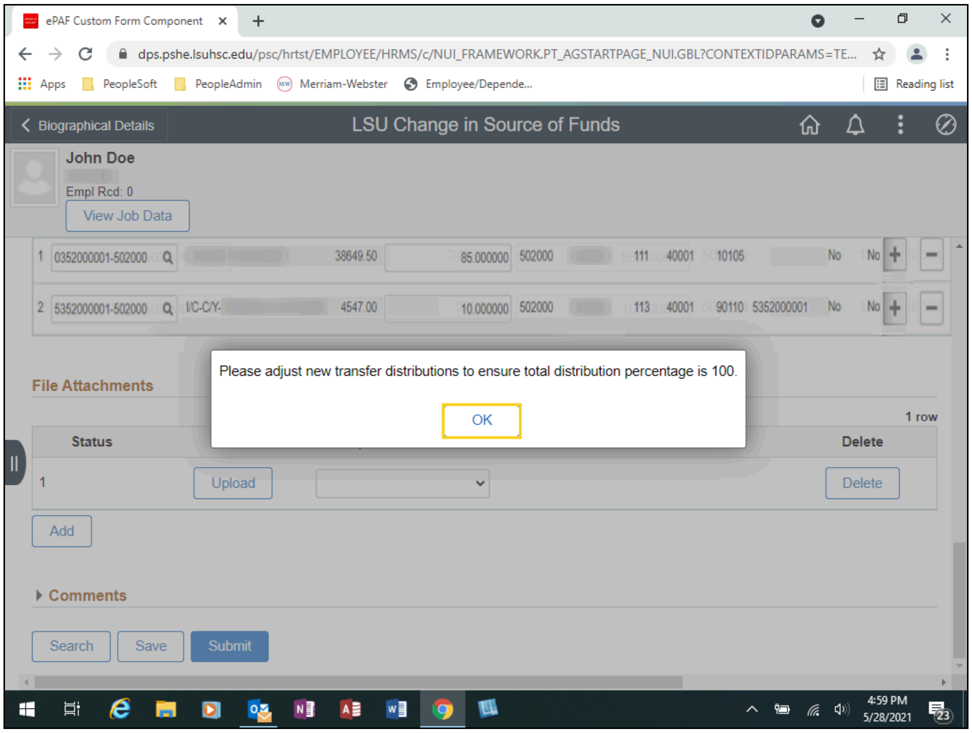
Add

▸ Comments

Search Save Submit

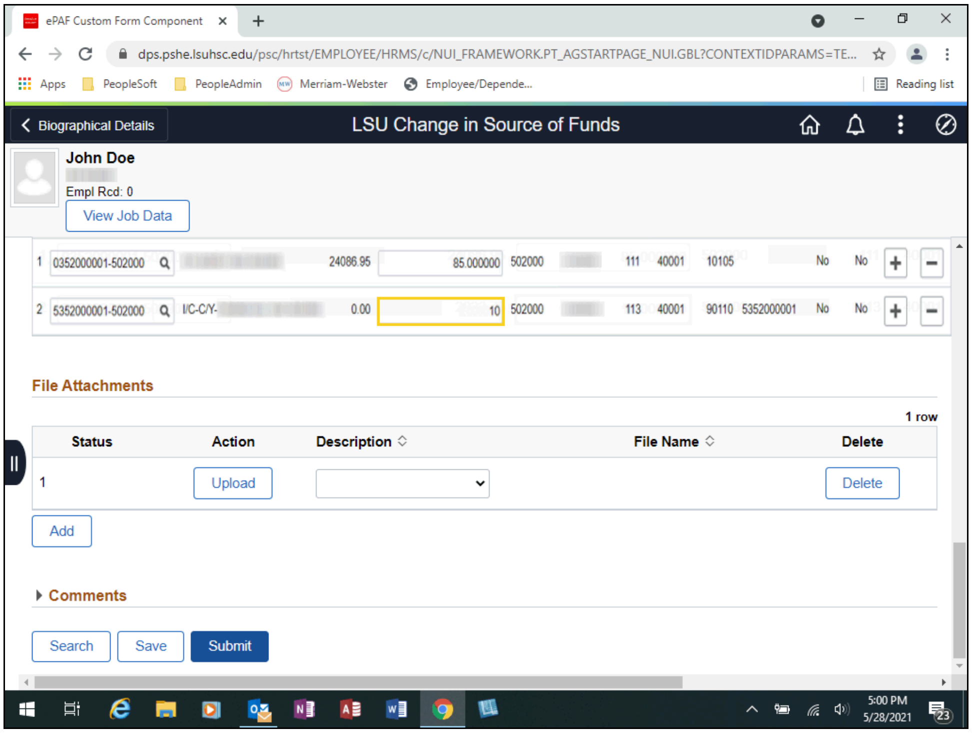
4:57 PM
5/28/2021

Step	Action
41.	Click in the **Submit** field.


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Biographical Details
LSU Change in Source of Funds
John Doe
Empl Rcd: 0
View Job Data
File Attachments
Status
Delete
Upload
Add
Comments
Search
Save
Submit
OK

Please adjust new transfer distributions to ensure total distribution percentage is 100.

Step	Action
42.	An error message is received since the total distribution percent does not equal 100%. Click the **OK** button. OK



ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Biographical Details
LSU Change in Source of Funds
View Job Data
Upload
Delete
Add
Search
Save
Submit
5:00 PM
5/28/2021

John Doe
[redacted]
Empl Rcd: 0

1	0352000001-502000	[redacted]	24086.95	85.000000	502000	[redacted]	111	40001	10105		No	No
2	5352000001-502000	I/C-C/Y-[redacted]	0.00	10	502000	[redacted]	113	40001	90110	5352000001	No	No

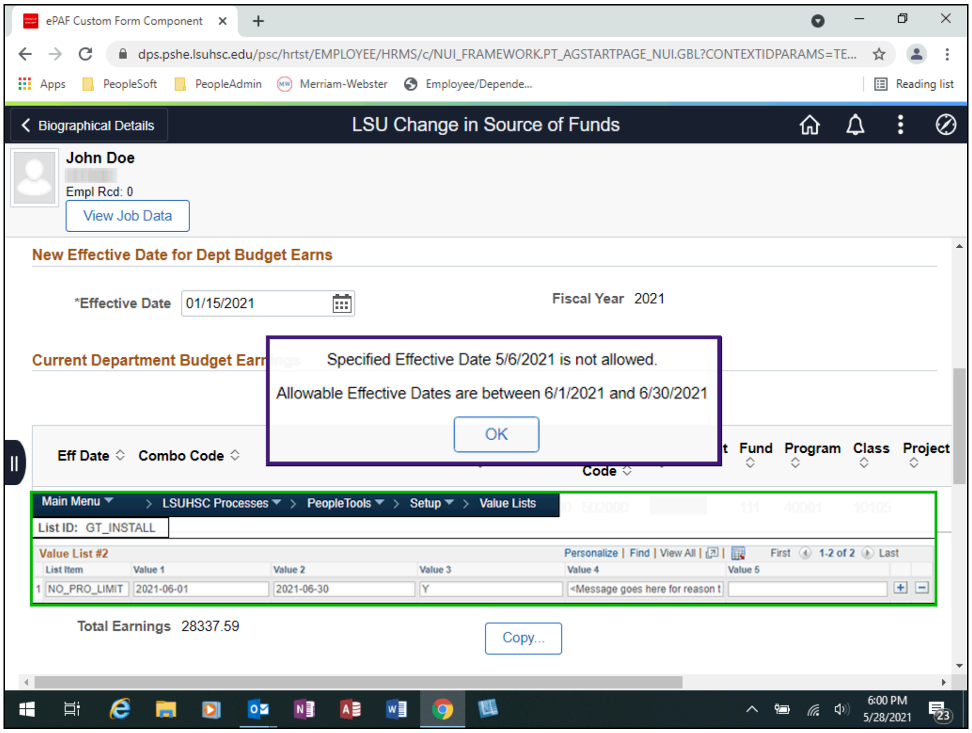
File Attachments

1 row

Status	Action	Description	File Name	Delete
1	Upload			Delete

▸ **Comments**

Step	Action
43.	One of the percentages must be increased by 5% so that the combined total is 100%. Change line 2 Percent from 10 to 15. Enter the desired information into the **Percent** field. Enter "**15**".
44.	Click the **Submit** button. Submit


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Biographical Details
LSU Change in Source of Funds
View Job Data
OK
Eff Date
Combo Code
Code
Fund
Program
Class
Project
Main Menu
LSUHSC Processes
PeopleTools
Setup
Value Lists
Personalize | Find | View All
First
1-2 of 2
Last
Copy...
6:00 PM
5/28/2021

John Doe
[redacted]
Empl Rcd: 0

New Effective Date for Dept Budget Earns

*Effective Date 01/15/2021

Fiscal Year 2021

Current Department Budget Earnings

Specified Effective Date 5/6/2021 is not allowed.

Allowable Effective Dates are between 6/1/2021 and 6/30/2021

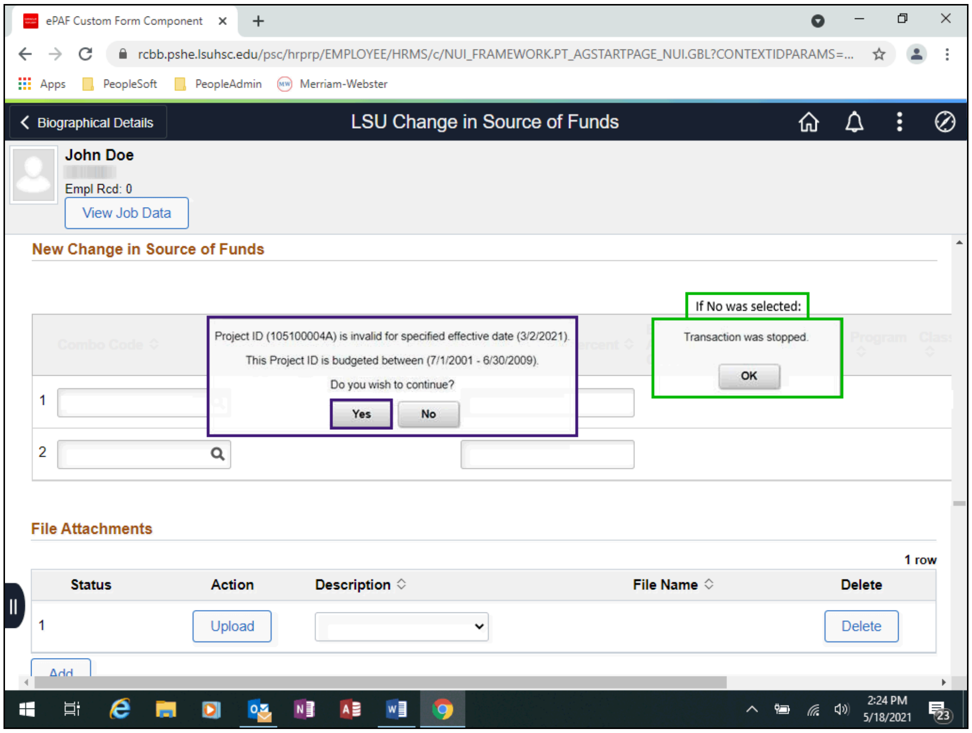
List ID: GT_INSTALL

Value List #2

	List Item	Value 1	Value 2	Value 3	Value 4	Value 5
1	NO_PRO_LIMIT	2021-06-01	2021-06-30	Y	<Message goes here for reason t	

Total Earnings 28337.59

Step	Action
45.	**Limit Effective Dates** If a *Limit Effective Date* is specified for the form, the system will prevent users from creating **Prospective** forms that do not fall within the specified date range. A message, like the one shown here, will display stating the specified date is not allowed. Configured date limits are controlled on the value list below, where *Value 1 = Minimum Date* and *Value 2 = Maximum Date*.


ePAF Custom Form Component
rcbb.pshe.lsuhsc.edu/psc/hrprp/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Biographical Details
LSU Change in Source of Funds
John Doe
Empl Rcd: 0
View Job Data
New Change in Source of Funds
Combo Code
Percent
Program
File Attachments
1 row
Status
Action
Description
File Name
Delete
Upload
Delete
Add
2:24 PM
5/18/2021

Project ID (105100004A) is invalid for specified effective date (3/2/2021).

This Project ID is budgeted between (7/1/2001 - 6/30/2009).

Do you wish to continue?

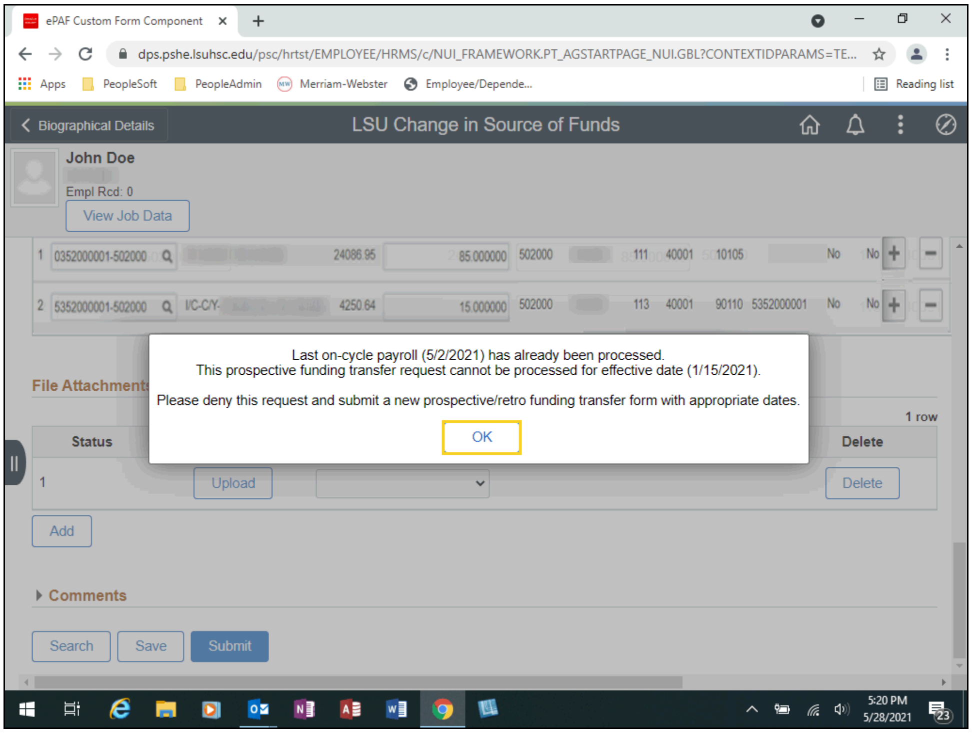
Yes No

If No was selected:

Transaction was stopped.

OK

Step	Action
46.	A ***Non-Grant*** project (e.g., resident contracts, hospital contracts, etc.) will give you a warning message with the option to stop or continue. If you answer "**Yes**", the form will continue with submission/approval. If you answer "**No**", the transaction will be stopped.

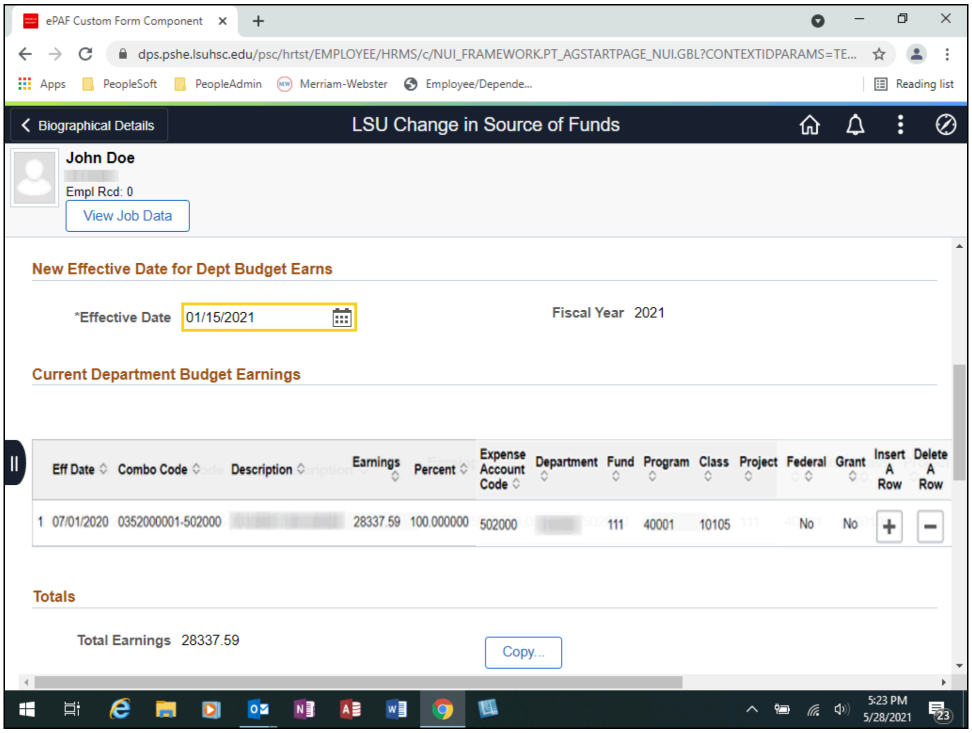

ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Biographical Details
LSU Change in Source of Funds
View Job Data
File Attachments
1 row
Status
Delete
Upload
Delete
Add
Comments
Search
Save
Submit
OK
5:20 PM
5/28/2021

John Doe
[redacted]
Empl Rcd: 0

Last on-cycle payroll (5/2/2021) has already been processed.
This prospective funding transfer request cannot be processed for effective date (1/15/2021).

Please deny this request and submit a new prospective/retro funding transfer form with appropriate dates.

Step	Action
47.	An error message is received because the *Effective Date* is not greater than the last on-cycle payroll processing date. Click the **OK** button. OK
48.	Click the **Up** scrollbar. ▲


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Biographical Details
LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0

View Job Data

New Effective Date for Dept Budget Earns

*Effective Date 01/15/2021

Fiscal Year 2021

Current Department Budget Earnings

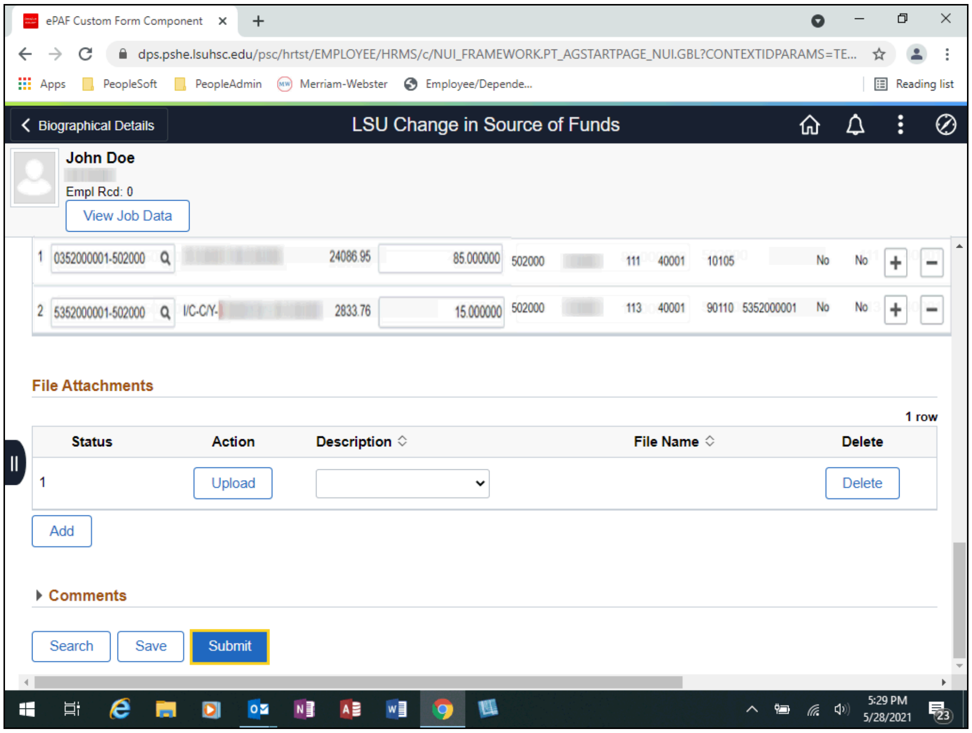
	Eff Date	Combo Code	Description	Earnings	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant	Insert A Row	Delete A Row
1	07/01/2020	0352000001-502000	[redacted]	28337.59	100.000000	502000	[redacted]	111	40001	10105		No	No	+	−

Totals

Total Earnings 28337.59

Copy...
5:23 PM
5/28/2021

Step	Action
49.	Enter the desired information into the ***Effective Date** field. Enter "**051521**".
50.	Click the **Down** scrollbar. ▾


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Biographical Details
LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0

View Job Data

1	0352000001-502000	[redacted]	24086.95	85.000000	502000	[redacted]	111	40001	10105		No	No	+ −
2	5352000001-502000	I/C-C/Y-[redacted]	2833.76	15.000000	502000	[redacted]	113	40001	90110	5352000001	No	No	+ −

File Attachments

1 row

Status	Action	Description	File Name	Delete
1	Upload			Delete

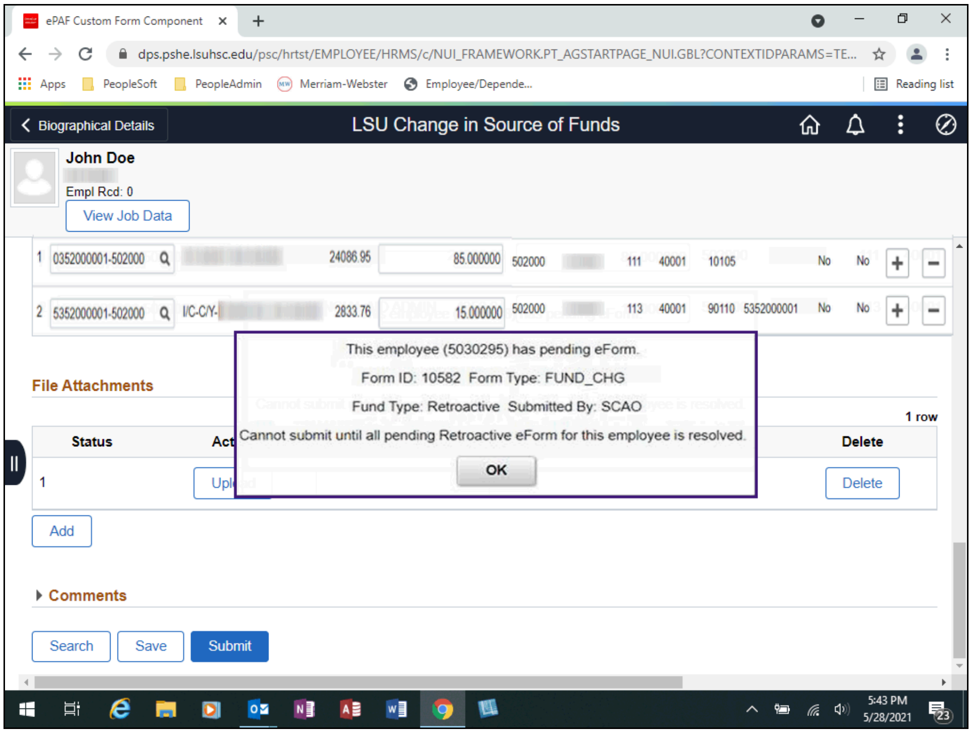
Add

▸ **Comments**

Search Save Submit

5:29 PM
5/28/2021

Step	Action
51.	Click the **Submit** button.

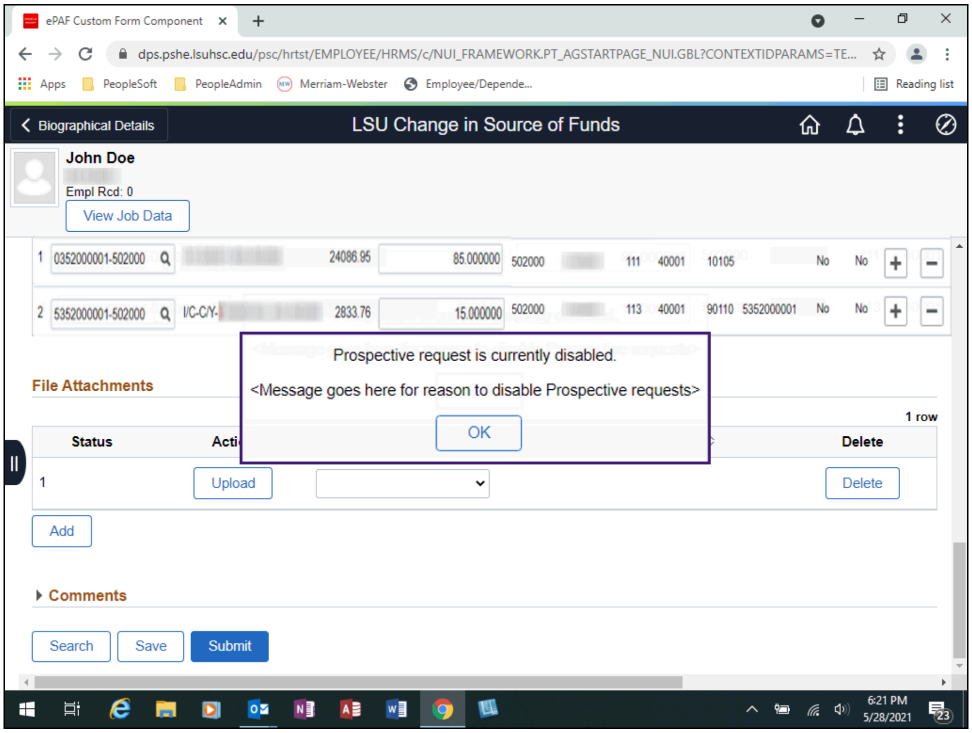

ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Biographical Details
LSU Change in Source of Funds
View Job Data
File Attachments
1 row
Status
Act
Delete
Upl
Delete
Add
Comments
Search
Save
Submit
5:43 PM
5/28/2021

John Doe
[redacted]
Empl Rcd: 0

1	0352000001-502000	[redacted]	24086.95	85.000000	502000	[redacted]	111	40001	10105		No	No
2	5352000001-502000	I/C-C/Y-[redacted]	2833.76	15.000000	502000	[redacted]	113	40001	90110	5352000001	No	No

This employee (5030295) has pending eForm.
Form ID: 10582 Form Type: FUND_CHG
Fund Type: Retroactive Submitted By: SCAO
Cannot submit until all pending Retroactive eForm for this employee is resolved.
OK

Step	Action
52.	**Pending e-Forms** You cannot submit a new form for an employee with an outstanding (Pending) funding change form for either Prospective or Retro. ***NOTE: The system will only allow one (1) pending Prospective and one (1) Retroactive PER.***


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
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PeopleAdmin
Merriam-Webster
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Add
Comments
Search
Save
Submit
6:21 PM
5/28/2021

LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0

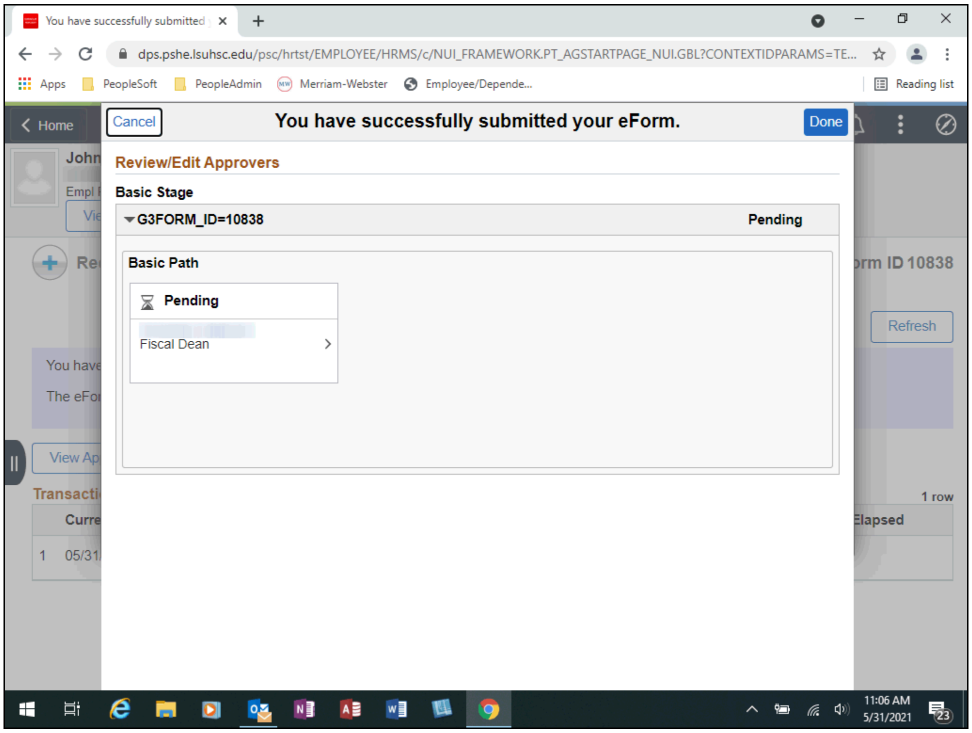
1 0352000001-502000 [redacted] 24086.95 85.000000 502000 [redacted] 111 40001 10105 No No
2 5352000001-502000 I/C-C/Y-[redacted] 2833.76 15.000000 502000 [redacted] 113 40001 90110 5352000001 No No

Prospective request is currently disabled.

<Message goes here for reason to disable Prospective requests>

OK

Step	Action
53.	**System Disabled** A message will display if the system has been disabled. This will occur when HCM entries cannot be allowed in the system, for example: • *Payroll closing at the end of the month* • *Year-end close out* The system may be disable for a few hours, or a day or two, depending on the catalyst for closing the system down.
54.	The *Request Change in Source of Funds: Results* page displays stating your e-form has successfully been submitted. Click the **View Approval Route** button. View Approval Route


You have successfully submitted
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
Cancel
Done
Refresh
11:06 AM
5/31/2021

You have successfully submitted your eForm.

Review/Edit Approvers

Basic Stage

G3FORM_ID=10838 **Pending**

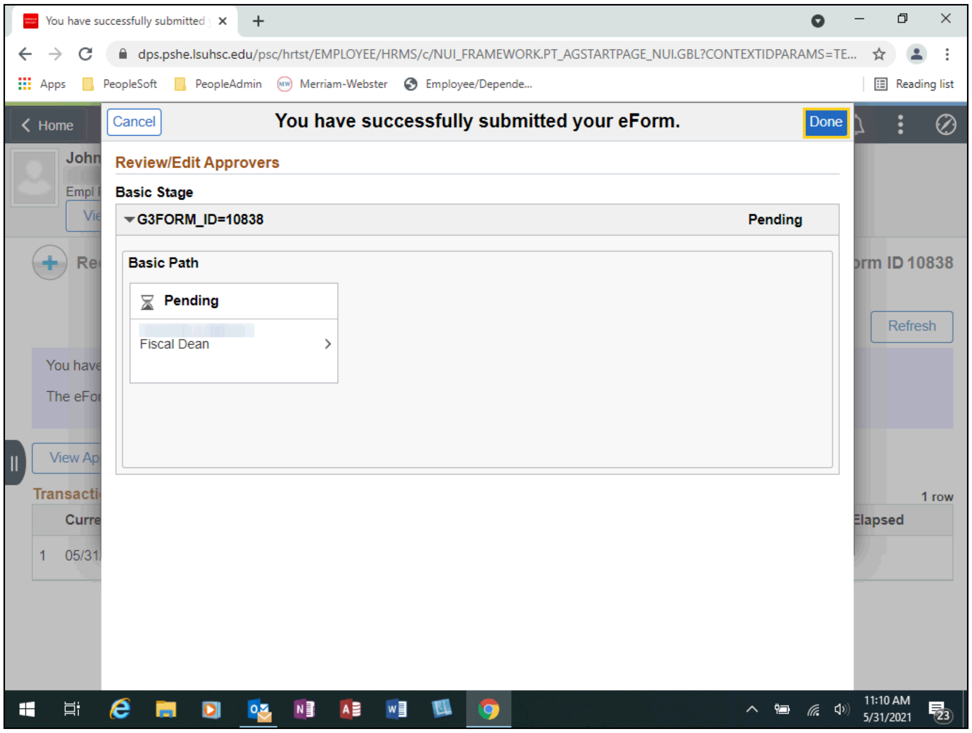
Basic Path

Pending

[redacted]

Fiscal Dean

Step	Action
55.	**Submitter is CSOF Business Manager** The Approval Routing for Prospective Requests is shown.



You have successfully submitted your eForm.

Review/Edit Approvers

Basic Stage

G3FORM_ID=10838 **Pending**

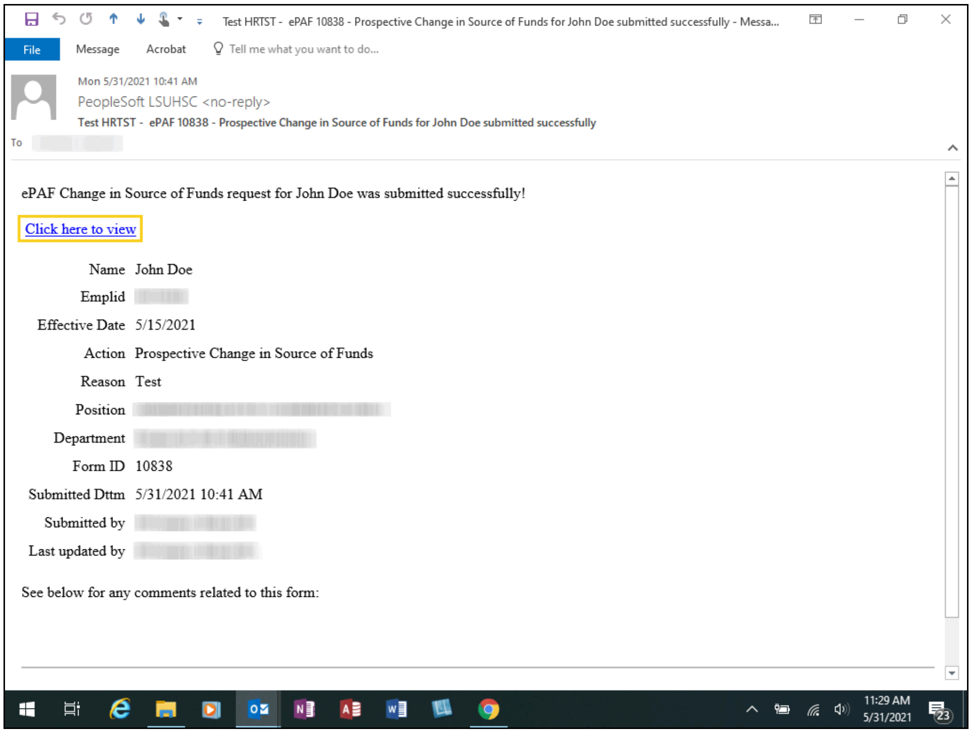
Basic Path

Pending

[redacted]
Fiscal Dean

You have successfully submitted
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
Cancel
Done
Refresh
1 row
Elapsed
11:10 AM
5/31/2021

Step	Action
56.	**Submitter is NOT CSOF Business Manager** The Approval Routing for Prospective Requests is shown here. Click the **Done** button. Done


Test HRTST - ePAF 10838 - Prospective Change in Source of Funds for John Doe submitted successfully - Messa...
File
Message
Acrobat
Tell me what you want to do...
11:29 AM
5/31/2021

Mon 5/31/2021 10:41 AM
PeopleSoft LSUHSC <no-reply>
Test HRTST - ePAF 10838 - Prospective Change in Source of Funds for John Doe submitted successfully
To [redacted]

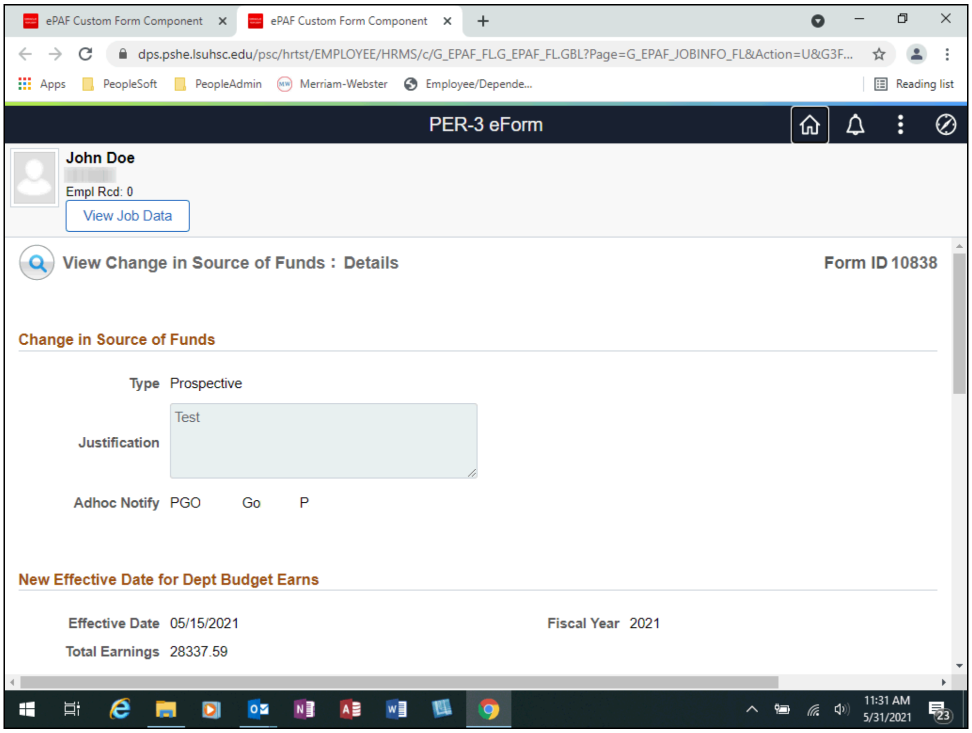
ePAF Change in Source of Funds request for John Doe was submitted successfully!

Click here to view

Name	John Doe
Emplid	[redacted]
Effective Date	5/15/2021
Action	Prospective Change in Source of Funds
Reason	Test
Position	[redacted]
Department	[redacted]
Form ID	10838
Submitted Dttm	5/31/2021 10:41 AM
Submitted by	[redacted]
Last updated by	[redacted]

See below for any comments related to this form:

Step	Action
57.	The **Submitter** will receive an email verifying the PER was successfully submitted. The Submitter can view the PER by selecting the "**Click here to view**" link. Click the **Click here to view** link. Click here to view


ePAF Custom Form Component
ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/G_EPAF_FL.G_EPAF_FL.GBL?Page=G_EPAF_JOBINFO_FL&Action=U&G3F...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
PER-3 eForm
View Job Data
11:31 AM
5/31/2021

John Doe
[redacted]
Empl Rcd: 0

View Change in Source of Funds : Details

Form ID 10838

Change in Source of Funds

Type Prospective

Justification Test

Adhoc Notify PGO Go P

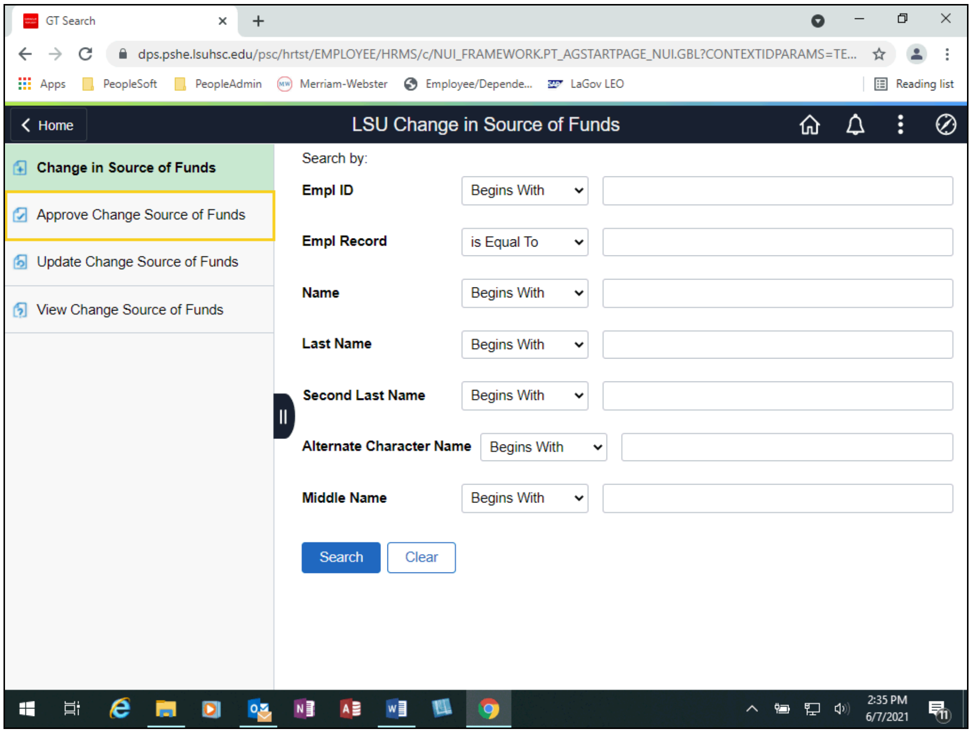
New Effective Date for Dept Budget Earns

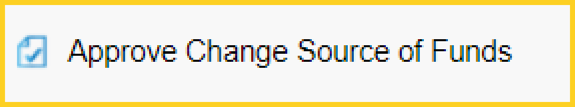
Effective Date 05/15/2021

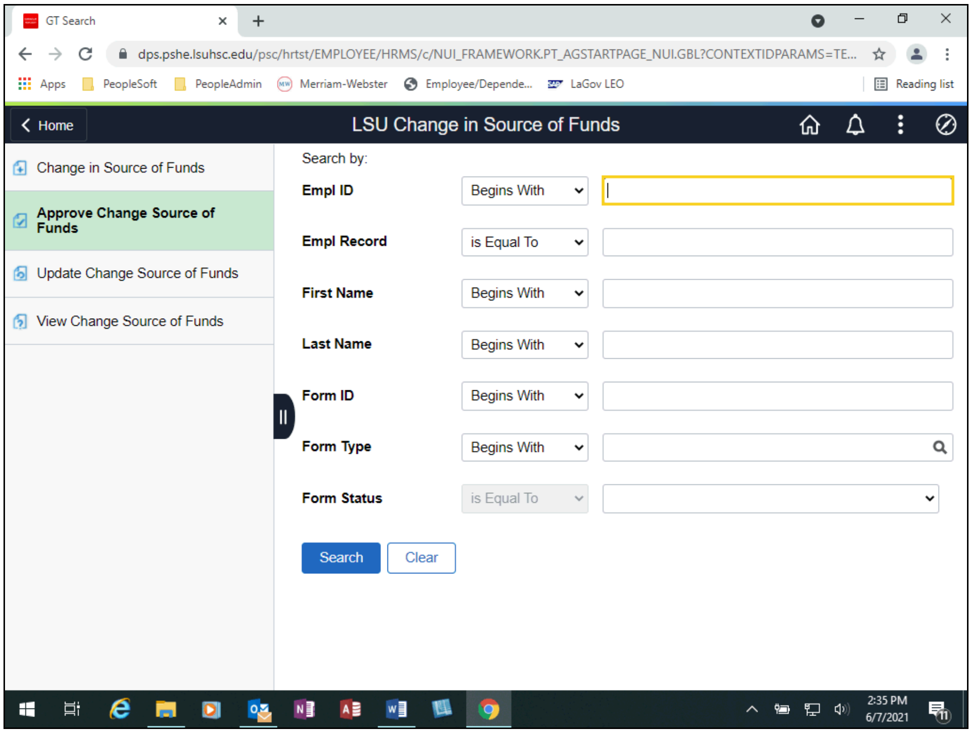
Fiscal Year 2021

Total Earnings 28337.59

Step	Action
58.	The completed **Change in Source of Funds** form displays.


GT Search
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
LaGov LEO
Reading list
Home
LSU Change in Source of Funds
Change in Source of Funds
Approve Change Source of Funds
Update Change Source of Funds
View Change Source of Funds
Search by:
Empl ID
Begins With
Empl Record
is Equal To
Name
Begins With
Last Name
Begins With
Second Last Name
Begins With
Alternate Character Name
Begins With
Middle Name
Begins With
Search
Clear
2:35 PM
6/7/2021

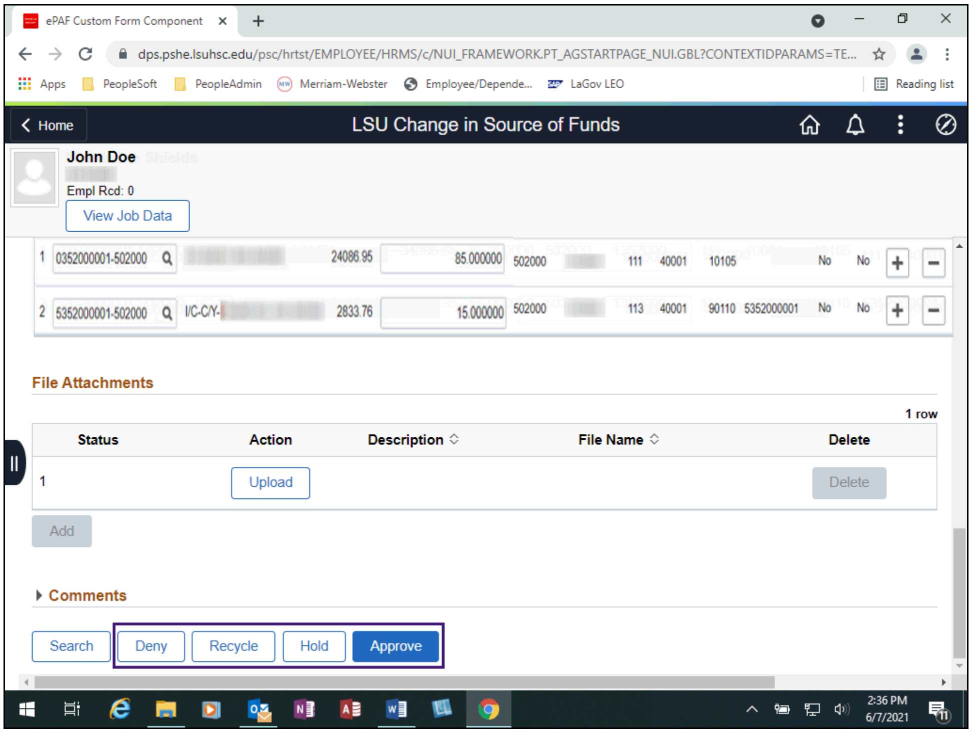
Step	Action
59.	**Change in Source of Funds Approval Menu Option** Users can also approve the CSOF from the menu options available on the Change in Source of Funds main page. Click the **Approve Change Source of Funds** button.  Approve Change Source of Funds


GT Search
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
LaGov LEO
Reading list
Home
LSU Change in Source of Funds
Change in Source of Funds
Approve Change Source of Funds
Update Change Source of Funds
View Change Source of Funds
Search
Clear
2:35 PM
6/7/2021

Search by:

Empl ID	Begins With	
Empl Record	is Equal To	
First Name	Begins With	
Last Name	Begins With	
Form ID	Begins With	
Form Type	Begins With	
Form Status	is Equal To	

Step	Action
60.	Enter the desired information into the **Empl ID** field. Enter "**0000000**".
61.	Click the **Search** button. Search
62.	The Approve Change in Source of Funds: Details page displays. Scroll down to view your Approval options. Click the **Down** scrollbar. ▼


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
LaGov LEO
Reading list
Home
View Job Data
Upload
Delete
Add
Search
Deny
Recycle
Hold
Approve
2:36 PM
6/7/2021

LSU Change in Source of Funds

John Doe [redacted]
[redacted]
Empl Rcd: 0

1 0352000001-502000 [redacted] 24086.95 85.000000 502000 [redacted] 111 40001 10105 No No

2 5352000001-502000 I/C-C/Y-[redacted] 2833.76 15.000000 502000 [redacted] 113 40001 90110 5352000001 No No

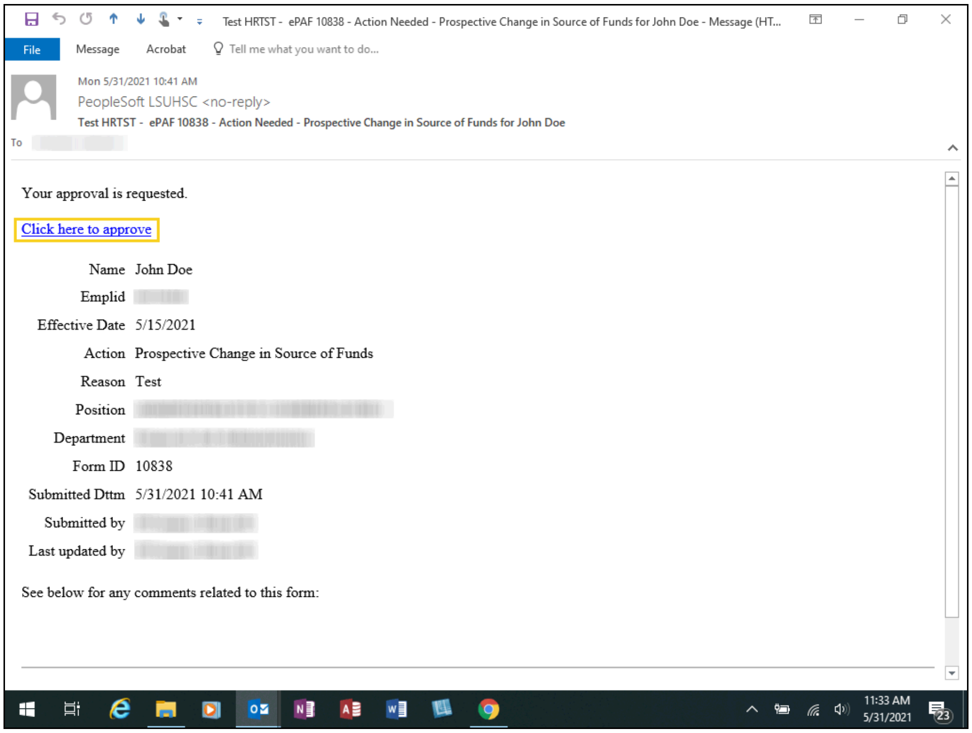
File Attachments

1 row

Status	Action	Description	File Name	Delete
1	Upload			Delete

Comments

Step	Action
63.	**Personnel Action Buttons** **Approve -** Use to approve the PER and automatically send it to the next approver. **Hold -** Use to close the PER and keep it in the worklist until approved, denied or recycled. **Recycle -** Use to send the PER back to the initiator. This will trigger the routing process to restart once the initiator re-submits. **Deny -** Use to reject the PER and permanently end its processing.
64.	Users will select the appropriate option from among *Approve*, *Hold*, *Recycle* and *Delete*. ***NOTE: Comments should be added if the PER is placed on Hold, Recycle, or Denied.***


Test HRTST - ePAF 10838 - Action Needed - Prospective Change in Source of Funds for John Doe - Message (HT...
File
Message
Acrobat
Tell me what you want to do...
11:33 AM
5/31/2021

Mon 5/31/2021 10:41 AM
PeopleSoft LSUHSC <no-reply>
Test HRTST - ePAF 10838 - Action Needed - Prospective Change in Source of Funds for John Doe
To [redacted]

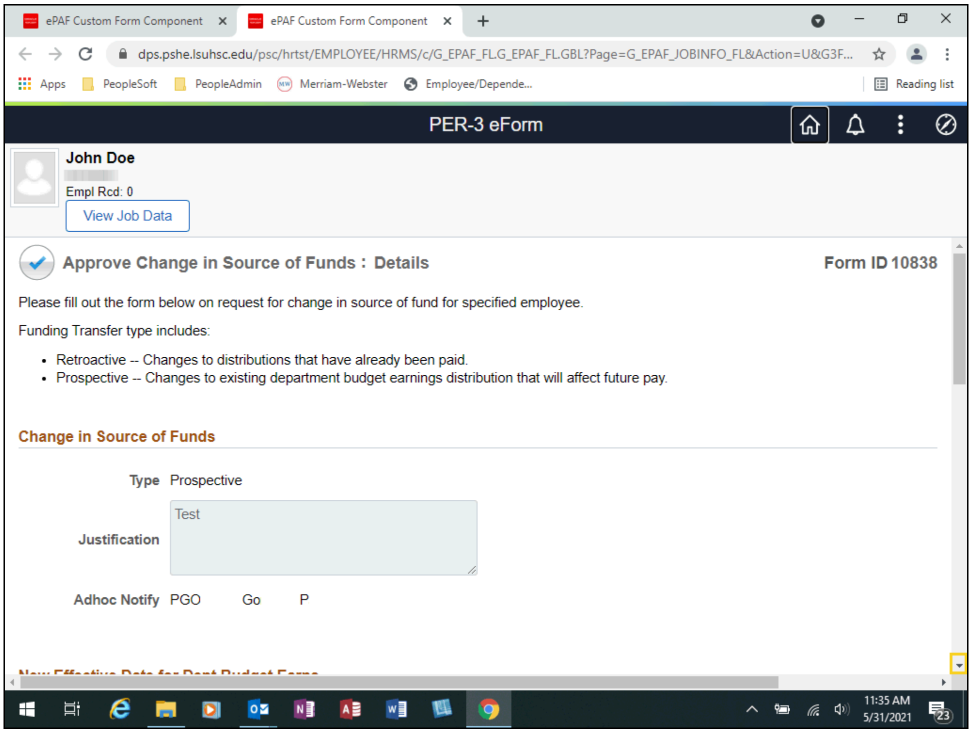
Your approval is requested.

Click here to approve

Name	John Doe
Emplid	[redacted]
Effective Date	5/15/2021
Action	Prospective Change in Source of Funds
Reason	Test
Position	[redacted]
Department	[redacted]
Form ID	10838
Submitted Dttm	5/31/2021 10:41 AM
Submitted by	[redacted]
Last updated by	[redacted]

See below for any comments related to this form:

Step	Action
65.	**Email Approval** The **Approver** will also receive an email stating his/her approval is requested. The **Approver** will select the "**Click here to approve**" link to access the PER. Click the **Click here to approve** link. Click here to approve


ePAF Custom Form Component
ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/G_EPAF_FL.G_EPAF_FL.GBL?Page=G_EPAF_JOBINFO_FL&Action=U&G3F...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
PER-3 eForm
View Job Data
11:35 AM
5/31/2021

John Doe
Empl Rcd: 0

Approve Change in Source of Funds : Details

Form ID 10838

Please fill out the form below on request for change in source of fund for specified employee.

Funding Transfer type includes:

- Retroactive -- Changes to distributions that have already been paid.
- Prospective -- Changes to existing department budget earnings distribution that will affect future pay.

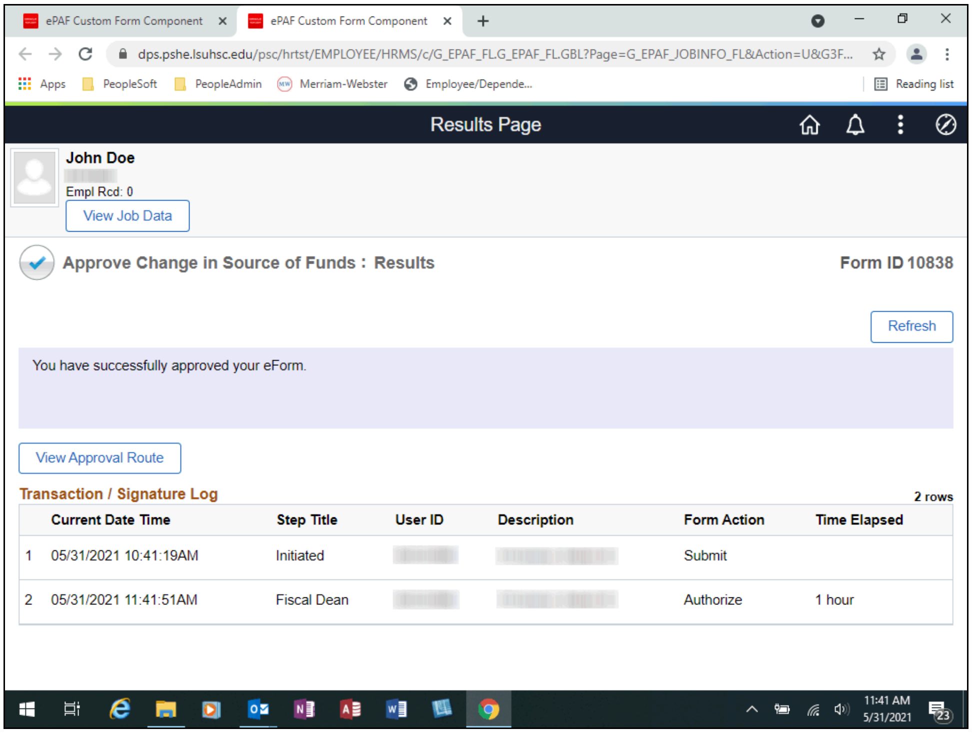
Change in Source of Funds

Type Prospective

Justification Test

Adhoc Notify PGO Go P

Step	Action
66.	The **Approve Change in Source of Funds: Details** page displays. Approvers should review the PER for correctness and completeness. Click the **Down** scrollbar. ▾
67.	***NOTE: Comments should be added if the PER is placed on Hold, Recycled, or Denied.*** Click in the **Approve** field. Approve


ePAF Custom Form Component
ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/G_EPAF_FL.G_EPAF_FL.GBL?Page=G_EPAF_JOBINFO_FL&Action=U&G3F...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Results Page
View Job Data
Refresh
View Approval Route
11:41 AM
5/31/2021

John Doe
[redacted]
Empl Rcd: 0

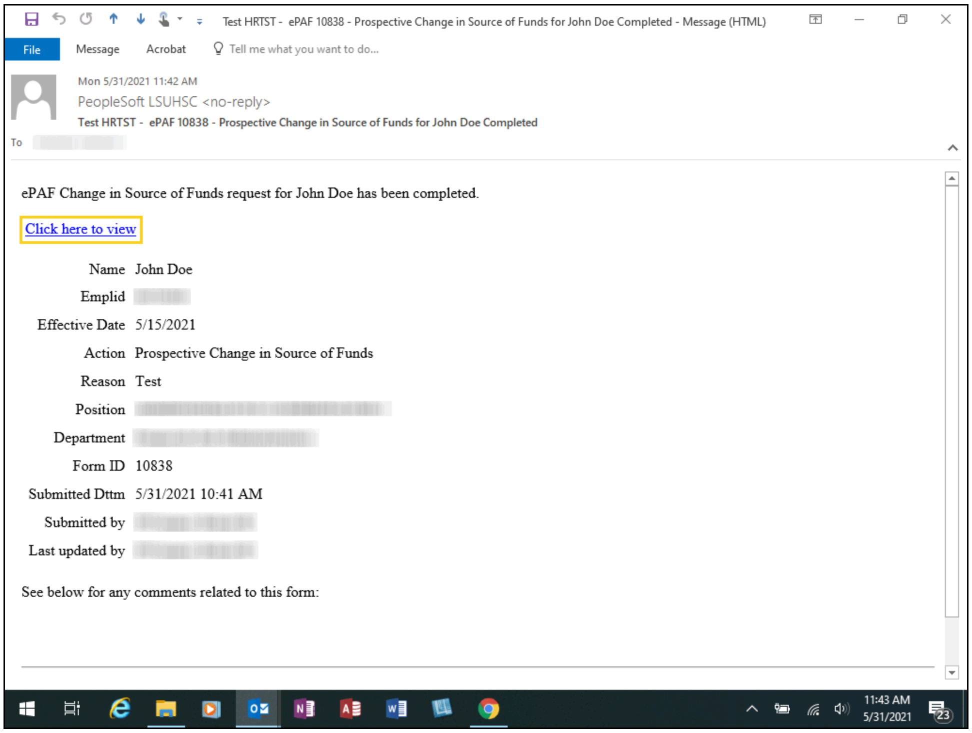
Approve Change in Source of Funds : Results **Form ID 10838**

You have successfully approved your eForm.

Transaction / Signature Log 2 rows

	Current Date Time	Step Title	User ID	Description	Form Action	Time Elapsed
1	05/31/2021 10:41:19AM	Initiated	[redacted]	[redacted]	Submit	
2	05/31/2021 11:41:51AM	Fiscal Dean	[redacted]	[redacted]	Authorize	1 hour

Step	Action
68.	The **Approve Change in Source of Funds: Results** page displays once the user has selected Approve. The transaction path also displays on the page.


Test HRTST - ePAF 10838 - Prospective Change in Source of Funds for John Doe Completed - Message (HTML)
File
Message
Acrobat
Tell me what you want to do...
11:43 AM
5/31/2021
23

Mon 5/31/2021 11:42 AM
PeopleSoft LSUHSC <no-reply>
Test HRTST - ePAF 10838 - Prospective Change in Source of Funds for John Doe Completed
To [redacted]

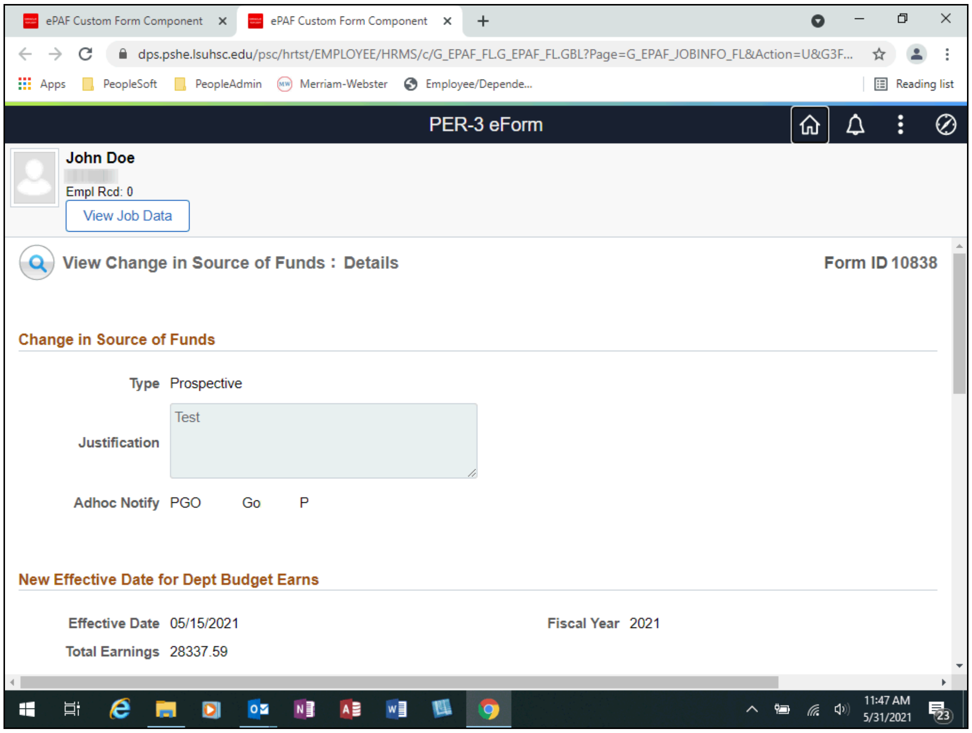
ePAF Change in Source of Funds request for John Doe has been completed.

Click here to view

Name	John Doe
Emplid	[redacted]
Effective Date	5/15/2021
Action	Prospective Change in Source of Funds
Reason	Test
Position	[redacted]
Department	[redacted]
Form ID	10838
Submitted Dttm	5/31/2021 10:41 AM
Submitted by	[redacted]
Last updated by	[redacted]

See below for any comments related to this form:

Step	Action
69.	**Notification on Final Approvals** The following groups will be notified once a request is *completely approved*: • Original Submitter • Business Manager • Delegated Manager Click the **Click here to view message** link. Click here to view


ePAF Custom Form Component
ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/G_EPAF_FL.G_EPAF_FL.GBL?Page=G_EPAF_JOBINFO_FL&Action=U&G3F...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
PER-3 eForm
View Job Data
11:47 AM
5/31/2021

John Doe
[redacted]
Empl Rcd: 0

View Change in Source of Funds : Details **Form ID 10838**

Change in Source of Funds

Type Prospective

Justification Test

Adhoc Notify PGO Go P

New Effective Date for Dept Budget Earns

Effective Date 05/15/2021 **Fiscal Year** 2021

Total Earnings 28337.59

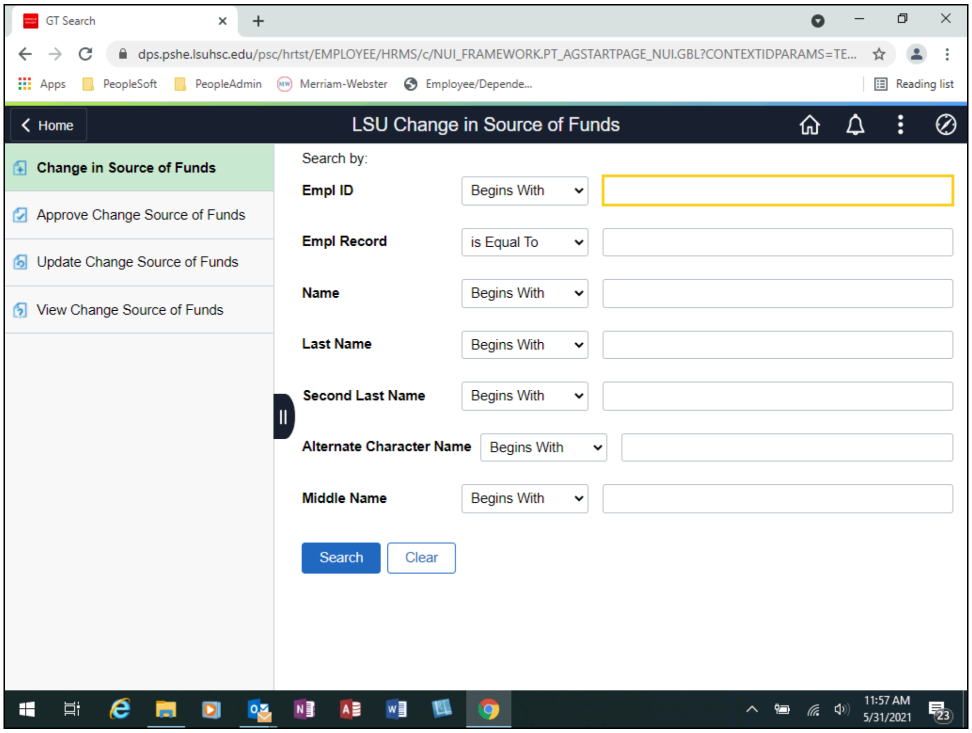
Step	Action
70.	The **View Change in Source of Funds: Details** page displays.
71.	This completes ***Enter Prospective Change in Source of Funds***. **End of Procedure.**

Retroactive Change in Source of Funds

Procedure

In this topic you will learn how to **Enter Retroactive Change of Sources Funds**.

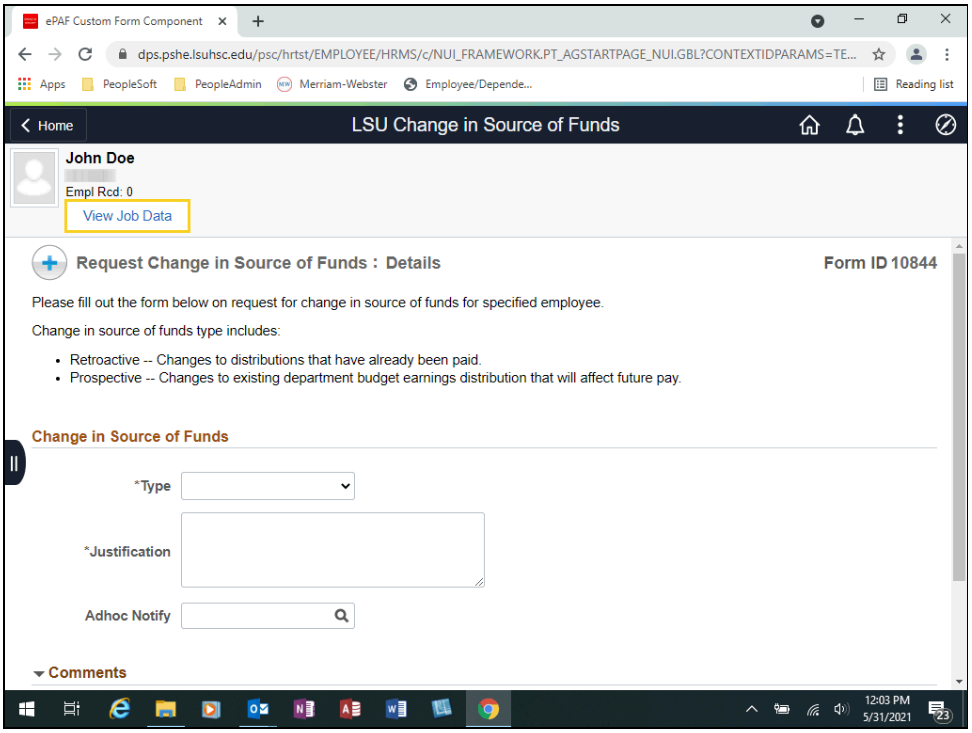
Step	Action
1.	The **Retroactive** process transfers funds that were already paid to the employee, but the project needs to be changed retroactively. ***NOTE: Creating a Retroactive Change in Source of Funds will update PAY_ERN_DIST with the specified changes.***


GT Search
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
LSU Change in Source of Funds
Change in Source of Funds
Approve Change Source of Funds
Update Change Source of Funds
View Change Source of Funds
Search
Clear
11:57 AM
5/31/2021

Search by:

Empl ID	Begins With	
Empl Record	is Equal To	
Name	Begins With	
Last Name	Begins With	
Second Last Name	Begins With	
Alternate Character Name	Begins With	
Middle Name	Begins With	

Step	Action
2.	***For training purposes only, the EMPL ID 0000000 will be used.*** Enter the desired information into the **Empl ID** field. Enter "**0000000**".
3.	Click the **Search** button. Search



ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
LSU Change in Source of Funds

John Doe

Empl Rcd: 0

View Job Data

Request Change in Source of Funds : Details

Form ID 10844

Please fill out the form below on request for change in source of funds for specified employee.

Change in source of funds type includes:

- Retroactive -- Changes to distributions that have already been paid.
- Prospective -- Changes to existing department budget earnings distribution that will affect future pay.

Change in Source of Funds

*Type

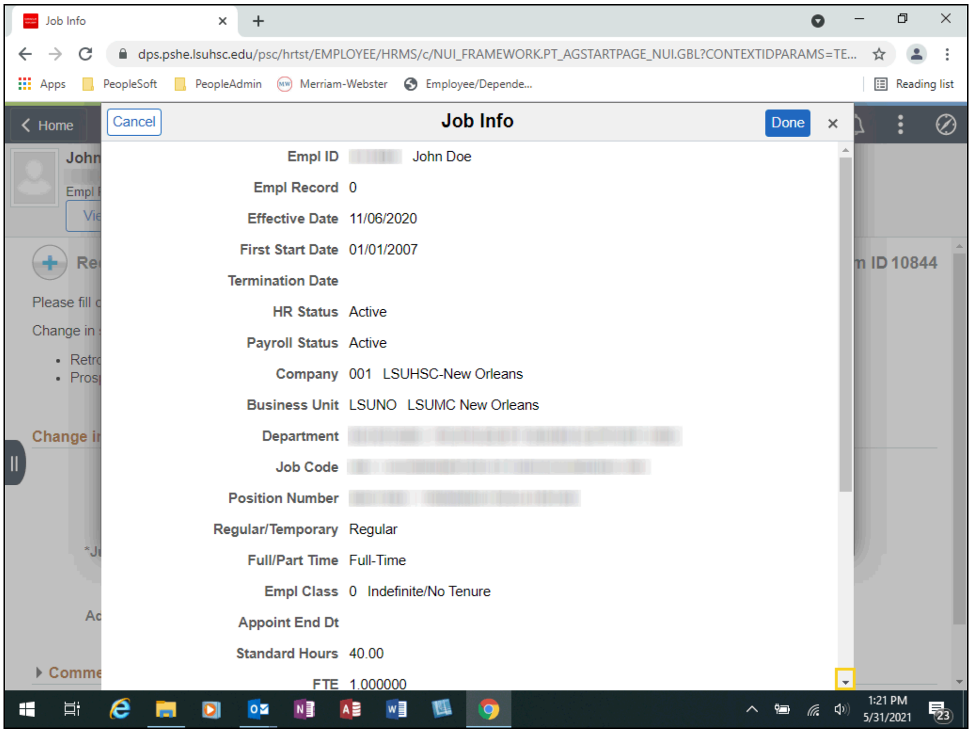
*Justification

Adhoc Notify

Comments

12:03 PM
5/31/2021

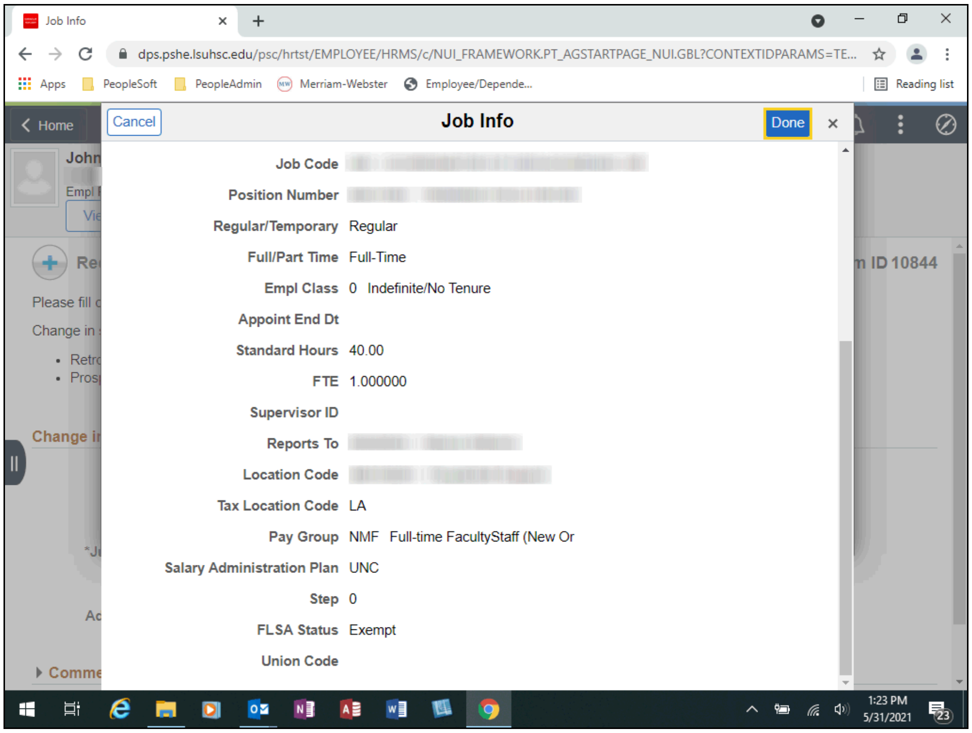
Step	Action
4.	The **Request Change in Source of Funds: Details** page displays Click the **View Job Data** button.


Job Info
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
Cancel
Done
1:21 PM
5/31/2021

Job Info

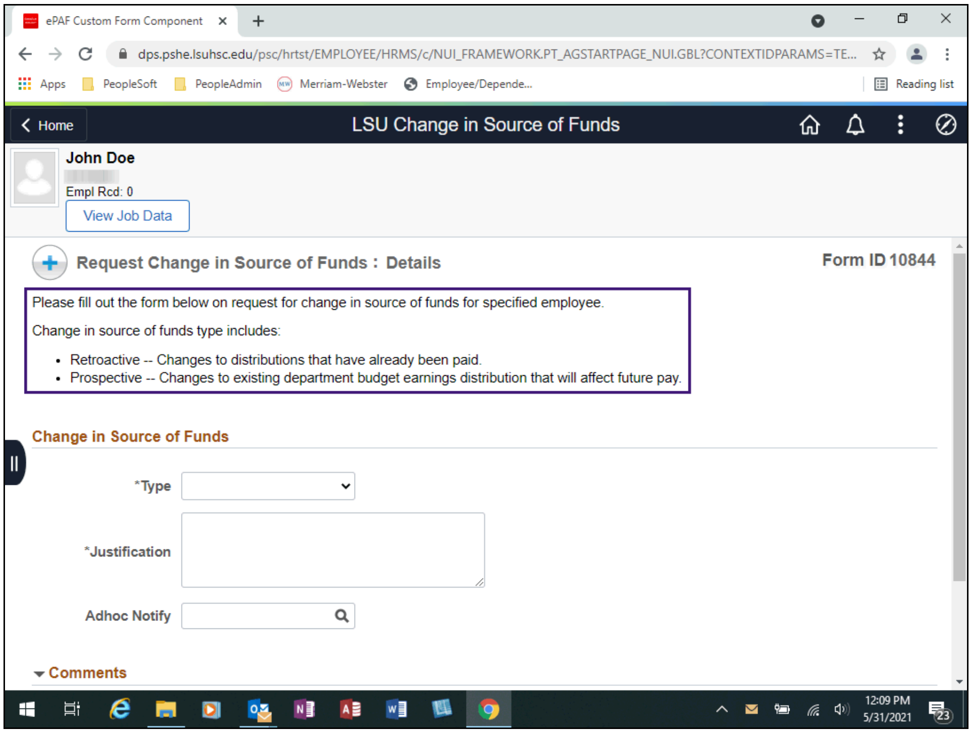
Empl ID	[redacted] John Doe
Empl Record	0
Effective Date	11/06/2020
First Start Date	01/01/2007
Termination Date	
HR Status	Active
Payroll Status	Active
Company	001 LSUHSC-New Orleans
Business Unit	LSUNO LSUMC New Orleans
Department	[redacted]
Job Code	[redacted]
Position Number	[redacted]
Regular/Temporary	Regular
Full/Part Time	Full-Time
Empl Class	0 Indefinite/No Tenure
Appoint End Dt	
Standard Hours	40.00
FTE	1.000000

Step	Action
5.	You can review the employee's current information on the *Job Info* page. Click the **Down** scrollbar. ▾


Job Info
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
Cancel
Job Info
Done
1:23 PM
5/31/2021

Job Code	[redacted]
Position Number	[redacted]
Regular/Temporary	Regular
Full/Part Time	Full-Time
Empl Class	0 Indefinite/No Tenure
Appoint End Dt	
Standard Hours	40.00
FTE	1.000000
Supervisor ID	
Reports To	[redacted]
Location Code	[redacted]
Tax Location Code	LA
Pay Group	NMF Full-time FacultyStaff (New Or
Salary Administration Plan	UNC
Step	0
FLSA Status	Exempt
Union Code	

Step	Action
6.	You can review the employee's current information on the *Job Info* page. Click the **Done** button. Done


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
LSU Change in Source of Funds
View Job Data
Comments
12:09 PM
5/31/2021

John Doe
[redacted]
Empl Rcd: 0

Request Change in Source of Funds : Details

Form ID 10844

Please fill out the form below on request for change in source of funds for specified employee.

Change in source of funds type includes:

- Retroactive -- Changes to distributions that have already been paid.
- Prospective -- Changes to existing department budget earnings distribution that will affect future pay.

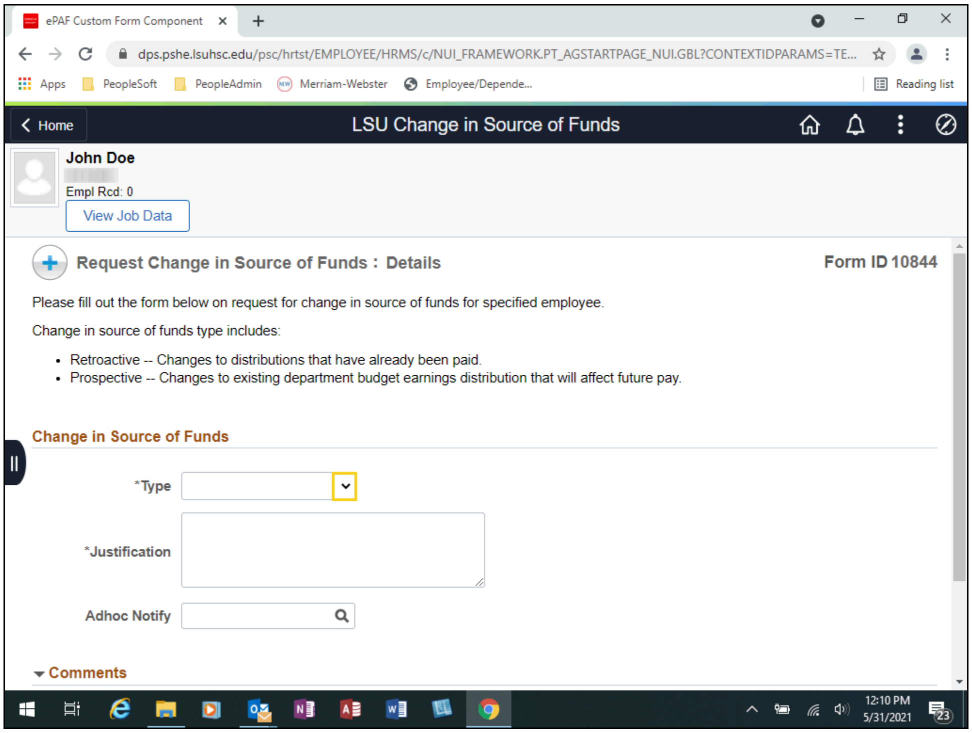
Change in Source of Funds

*Type

*Justification

Adhoc Notify

Step	Action
7.	**Instruction Text** This text will only be displayed on initial form request. Approvers and viewers will not see this text.


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
View Job Data
Comments
12:10 PM
5/31/2021

LSU Change in Source of Funds

John Doe

Empl Rcd: 0

Request Change in Source of Funds : Details

Form ID 10844

Please fill out the form below on request for change in source of funds for specified employee.

Change in source of funds type includes:

- Retroactive -- Changes to distributions that have already been paid.
- Prospective -- Changes to existing department budget earnings distribution that will affect future pay.

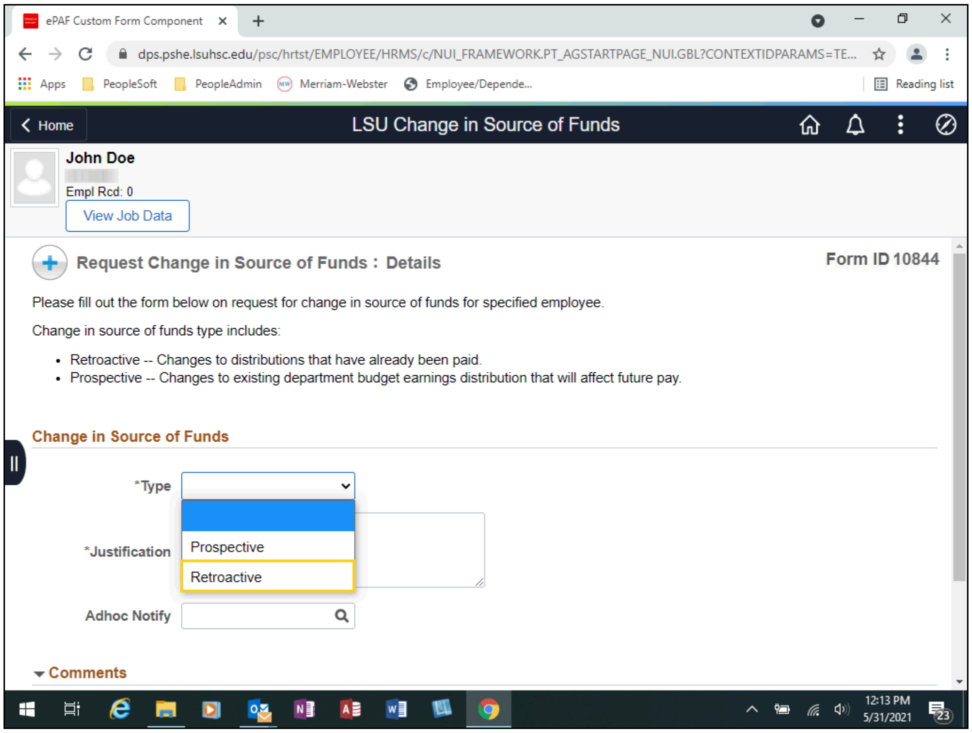
Change in Source of Funds

*Type

*Justification

Adhoc Notify

Step	Action
8.	Click the ***Type** dropdown button to activate the menu. ⌄


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
12:13 PM
5/31/2021

LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0
View Job Data

Request Change in Source of Funds : Details

Form ID 10844

Please fill out the form below on request for change in source of funds for specified employee.

Change in source of funds type includes:

- Retroactive -- Changes to distributions that have already been paid.
- Prospective -- Changes to existing department budget earnings distribution that will affect future pay.

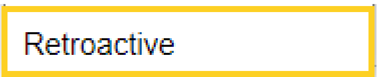
Change in Source of Funds

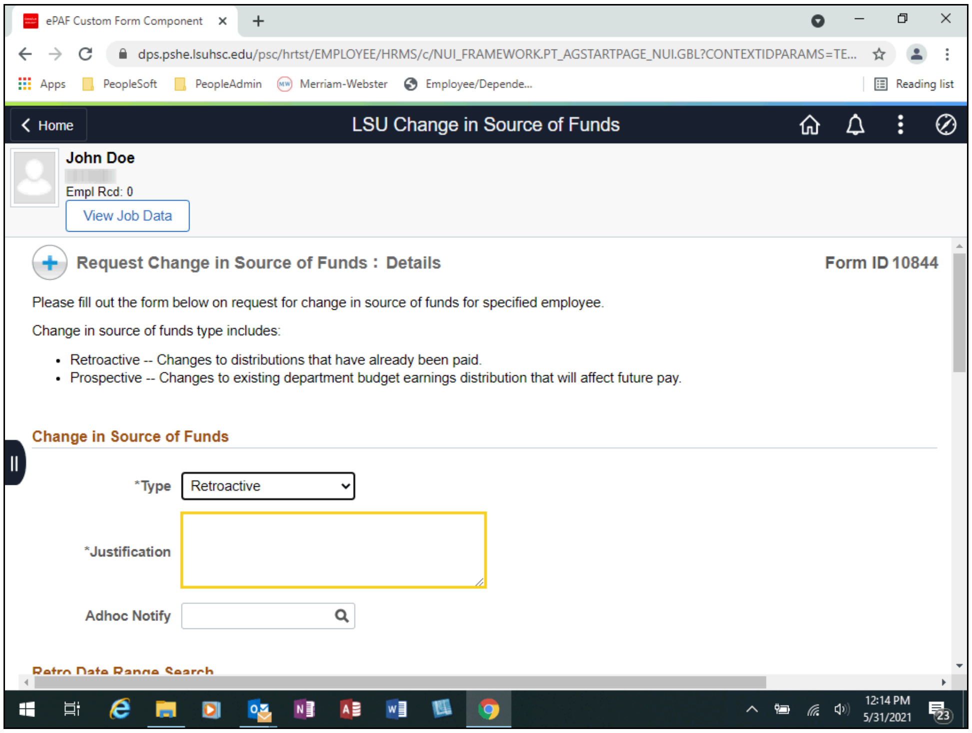
*Type
Prospective
Retroactive

*Justification

Adhoc Notify

Comments

Step	Action
9.	**Type** There are two *Types* of Change in Source of Funds: **Prospective -** Updates department budget earnings with specified distributions changes and Effective Date. **Retroactive -** The process to transfer funds that were already paid to the employee and the project needs to be changed retroactively. Click the **Retroactive** list item.  Retroactive



ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0
View Job Data

Request Change in Source of Funds : Details

Form ID 10844

Please fill out the form below on request for change in source of funds for specified employee.

Change in source of funds type includes:

- Retroactive -- Changes to distributions that have already been paid.
- Prospective -- Changes to existing department budget earnings distribution that will affect future pay.

Change in Source of Funds

*Type: Retroactive

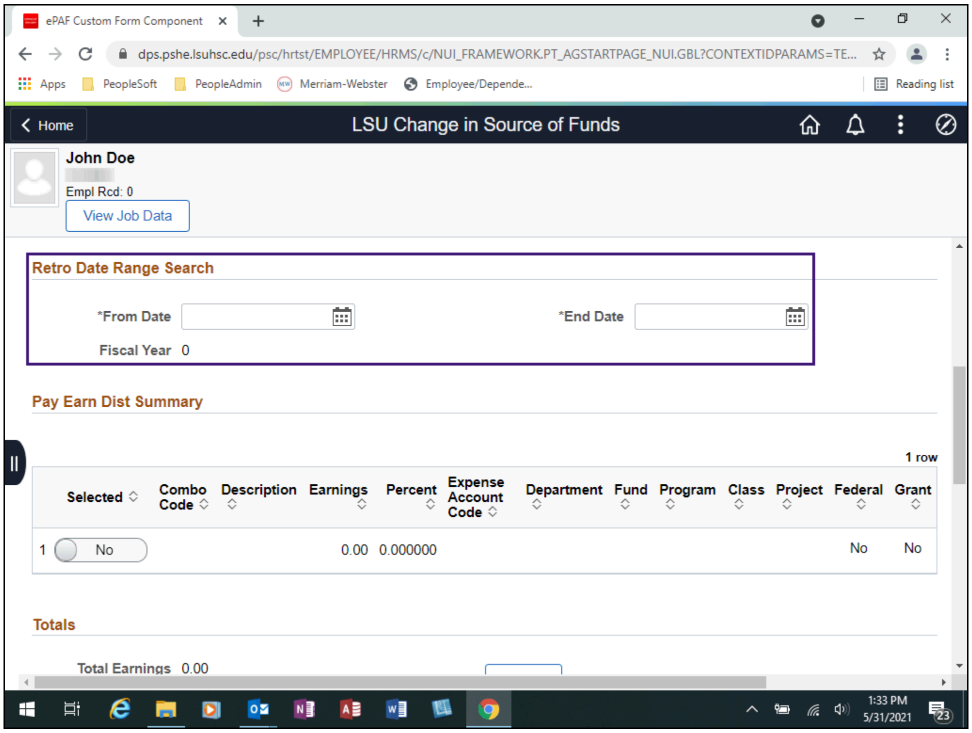
*Justification:

Adhoc Notify:

Retro Date Range Search

12:14 PM
5/31/2021

Step	Action
10.	**Justification** The *Justification* field is a free form text field. Here you will enter the reason (e.g., opened new contract, transfer to state fund account, etc.) for initiating the PER. Enter the desired information into the ***Justification** field. Enter "**Retro Processing**".
11.	**Adhoc Notify** Use the *Adhoc Notify* field to send an additional notification (e.g., employee you are adjusting, Principal Investigator, etc.) after all approvals have been completed. ***NOTE: Only a person allowed access to the PeopleSoft HCM system will be able to receive Adhoc notifications. An Adhoc user can only view information if they have security access for the employee's home department.*** Enter the desired information into the **Adhoc Notify** field. Enter "**KOC**".
12.	Click the **Down** scrollbar. ▼


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
View Job Data
1:33 PM
5/31/2021

LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0

Retro Date Range Search

*From Date

*End Date

Fiscal Year 0

Pay Earn Dist Summary

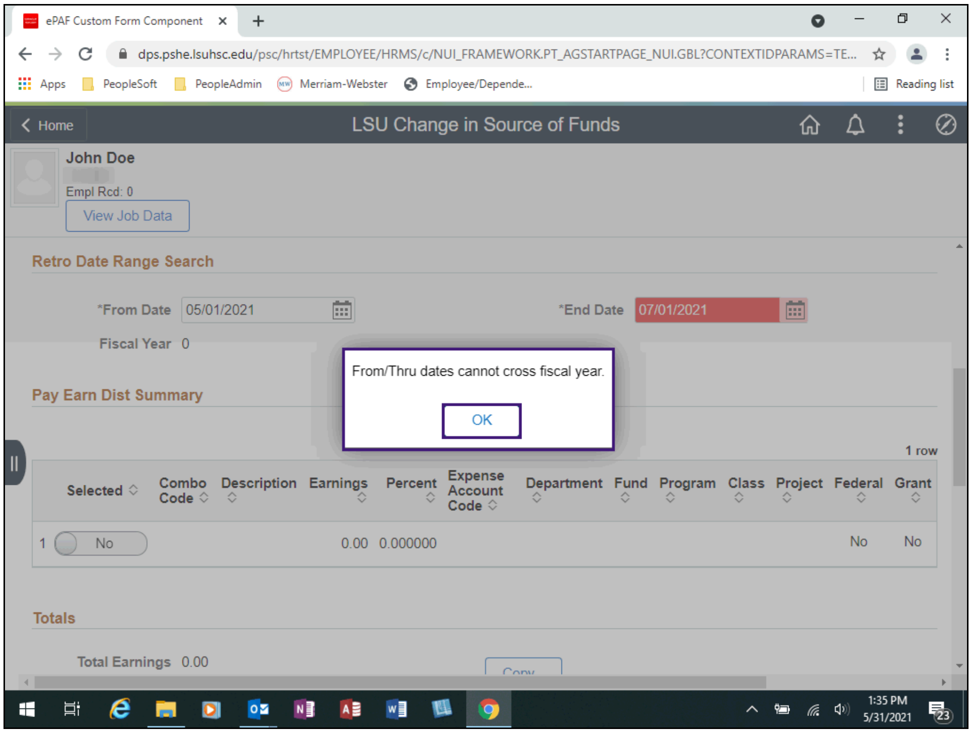
1 row

	Selected	Combo Code	Description	Earnings	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant
1	No			0.00	0.000000							No	No

Totals

Total Earnings 0.00

Step	Action
13.	**Retro Data Range Search** Enter parameters to search for date range and account to retro if needed. • Cannot cross Fiscal Year • Each CSOF can only affect **one** Fiscal Year • SGF from a prior Fiscal Year may **not** be moved


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
LSU Change in Source of Funds
View Job Data
Retro Date Range Search
Pay Earn Dist Summary
OK
1 row
Selected
Combo Code
Description
Earnings
Percent
Expense Account Code
Department
Fund
Program
Class
Project
Federal
Grant
Totals
Copy
1:35 PM
5/31/2021

John Doe
Empl Rcd: 0

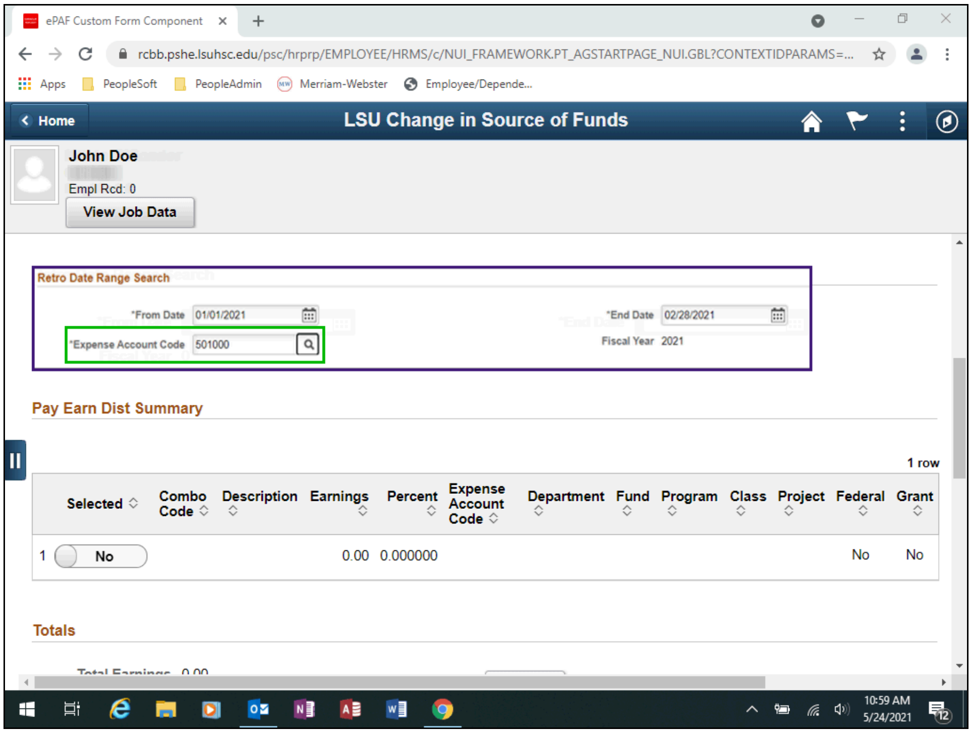
*From Date 05/01/2021
*End Date 07/01/2021
Fiscal Year 0

From/Thru dates cannot cross fiscal year.

Selected	Combo Code	Description	Earnings	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant
1 No			0.00	0.000000							No	No

Total Earnings 0.00

Step	Action
14.	**From/End Dates** The error message shown here will display if the *From/End* dates cross Fiscal Years.
15.	**Exercise** The *From Date* will be 02/01/21 and the *End Date* will be 03/01/21. Enter the desired information into the ***From Date** field. Enter "**020121**".
16.	Enter the desired information into the ***End Date** field. Enter "**030121**".
17.	Press **[Tab]**.


ePAF Custom Form Component
rcbb.pshe.lsuhsc.edu/psc/hrprp/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Home
LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0

View Job Data

Retro Date Range Search

*From Date 01/01/2021
*End Date 02/28/2021
*Expense Account Code 501000
Fiscal Year 2021

Pay Earn Dist Summary

1 row

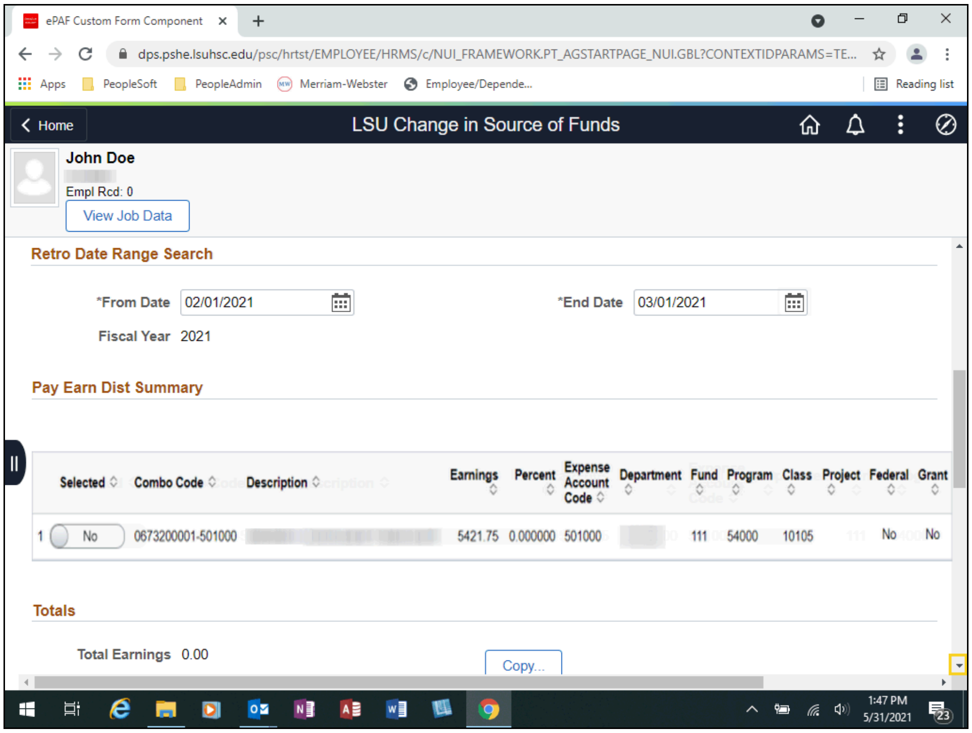
	Selected	Combo Code	Description	Earnings	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant
1	No			0.00	0.000000							No	No

Totals

Total Earnings 0.00

10:59 AM
5/24/2021

Step	Action
18.	**Account** If the **Expense Account Code* displays as shown here, select the Account to be retro'ed. Only **one** account can be retro'ed per request.


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
LSU Change in Source of Funds
View Job Data
Copy...
1:47 PM
5/31/2021

John Doe
[redacted]
Empl Rcd: 0

Retro Date Range Search

*From Date 02/01/2021
*End Date 03/01/2021
Fiscal Year 2021

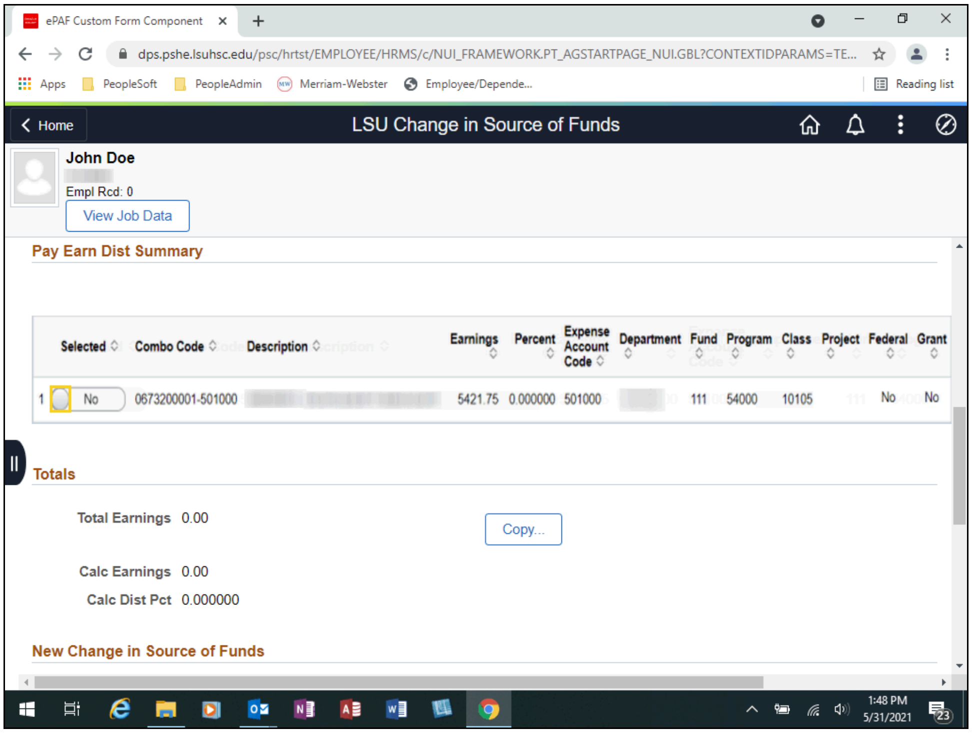
Pay Earn Dist Summary

	Selected	Combo Code	Description	Earnings	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant
1	No	0673200001-501000	[redacted]	5421.75	0.000000	501000	[redacted]	111	54000	10105		No	No

Totals

Total Earnings 0.00

Step	Action
19.	**Pay Earnings Distribution Summary** The *Pay Earn Dist Summary* displays providing a list of summary totals of Pay Earnings Distributions specified by the parameters set in the *Retro Date Range Search*. Click the **Down** scrollbar.


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
LSU Change in Source of Funds
View Job Data
Copy...
1:48 PM
5/31/2021

John Doe
[redacted]
Empl Rcd: 0

Pay Earn Dist Summary

	Selected	Combo Code	Description	Earnings	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant
1	○ No	0673200001-501000	[redacted]	5421.75	0.000000	501000	[redacted]	111	54000	10105		No	No

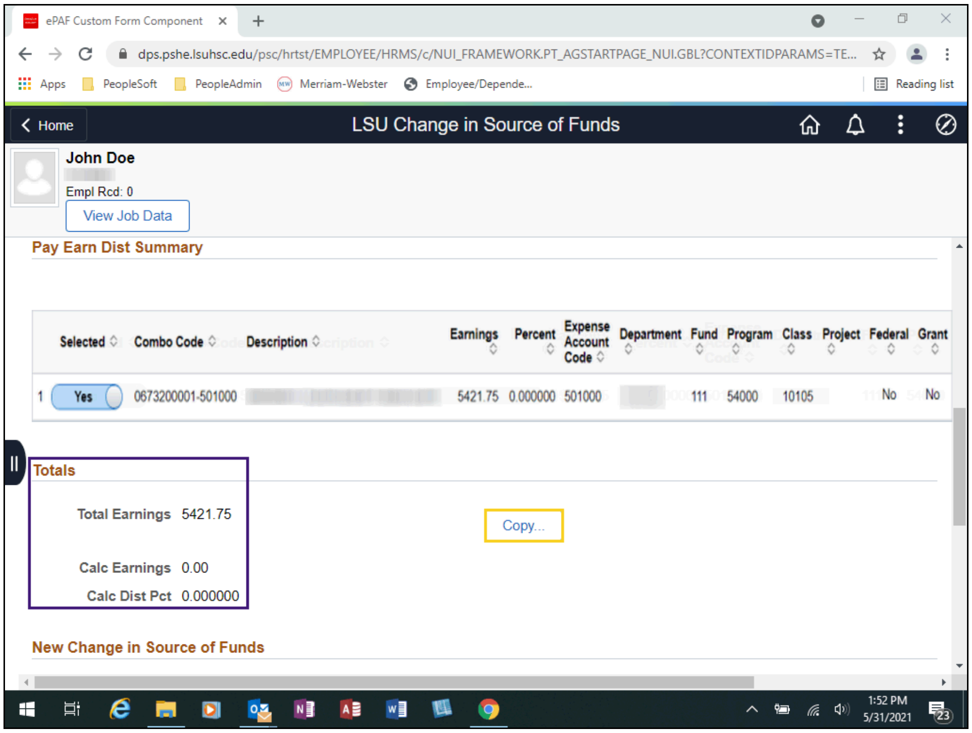
Totals

Total Earnings 0.00

Calc Earnings 0.00
Calc Dist Pct 0.000000

New Change in Source of Funds

Step	Action
20.	Select "**Yes**" to the *Combo Code* you wish to adjust. The *Combo Code* is the Project-Account code. The *Combo Code* selected **must** be within budget effective dates. Click the **Selected Yes** option. ○



dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...

LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0

Pay Earn Dist Summary

	Selected	Combo Code	Description	Earnings	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant
1	Yes	0673200001-501000	[redacted]	5421.75	0.000000	501000	[redacted]	111	54000	10105		No	No

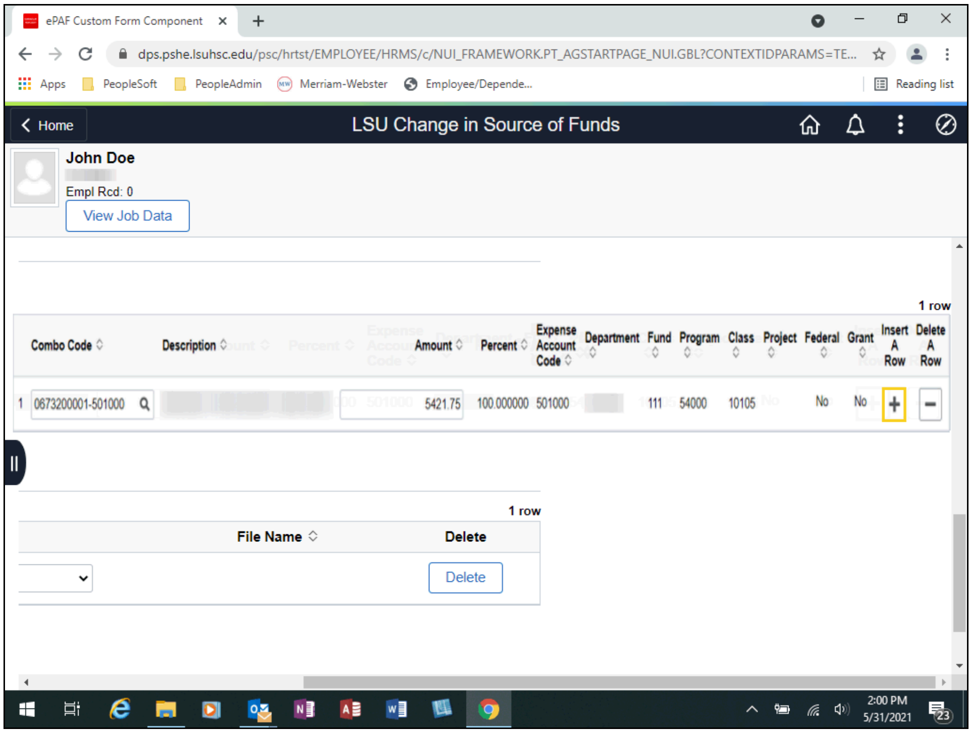
Totals

Total Earnings 5421.75
Calc Earnings 0.00
Calc Dist Pct 0.000000

New Change in Source of Funds

ePAF Custom Form Component
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
View Job Data
Copy...
1:52 PM
5/31/2021

Step	Action
21.	**Totals** • **Copy** – copy current distribution into “New Change in Source of Funds” grid • **Total Earnings** – total amount of current distributions • **Calc Earnings** – total amount of new distributions Click the **Copy...** button. Copy...
22.	Click the **Down** scrollbar. ▾
23.	**New Change in Source of Funds** Users must specify the new project to move the Change in Source of Funds into.


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0

View Job Data

1 row

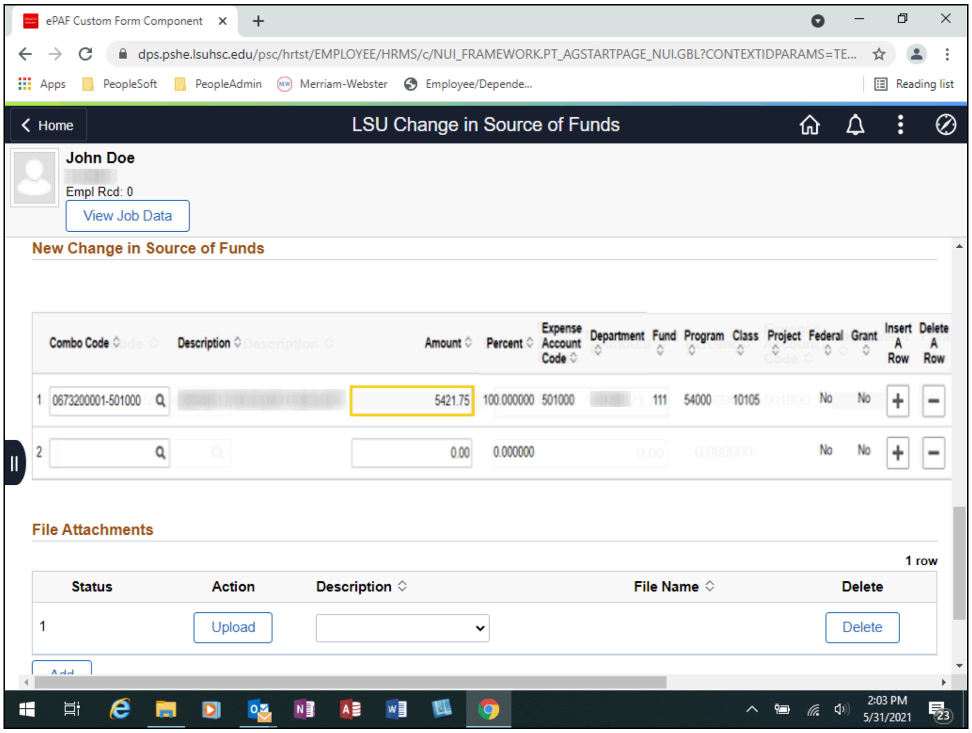
	Combo Code	Description	Amount	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant	Insert A Row	Delete A Row
1	0673200001-501000	[redacted]	5421.75	100.000000	501000	[redacted]	111	54000	10105		No	No	+	−

1 row

File Name	Delete
	Delete

2:00 PM
5/31/2021

Step	Action
24.	A new row must be created to add a new Combo Code. Click the **Add a New Row** button. +



ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
LSU Change in Source of Funds

John Doe
[redacted]
Empl Rcd: 0

View Job Data

New Change in Source of Funds

	Combo Code	Description	Amount	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant	Insert A Row	Delete A Row
1	0673200001-501000	[redacted]	5421.75	100.000000	501000	[redacted]	111	54000	10105		No	No	+	−
2			0.00	0.000000							No	No	+	−

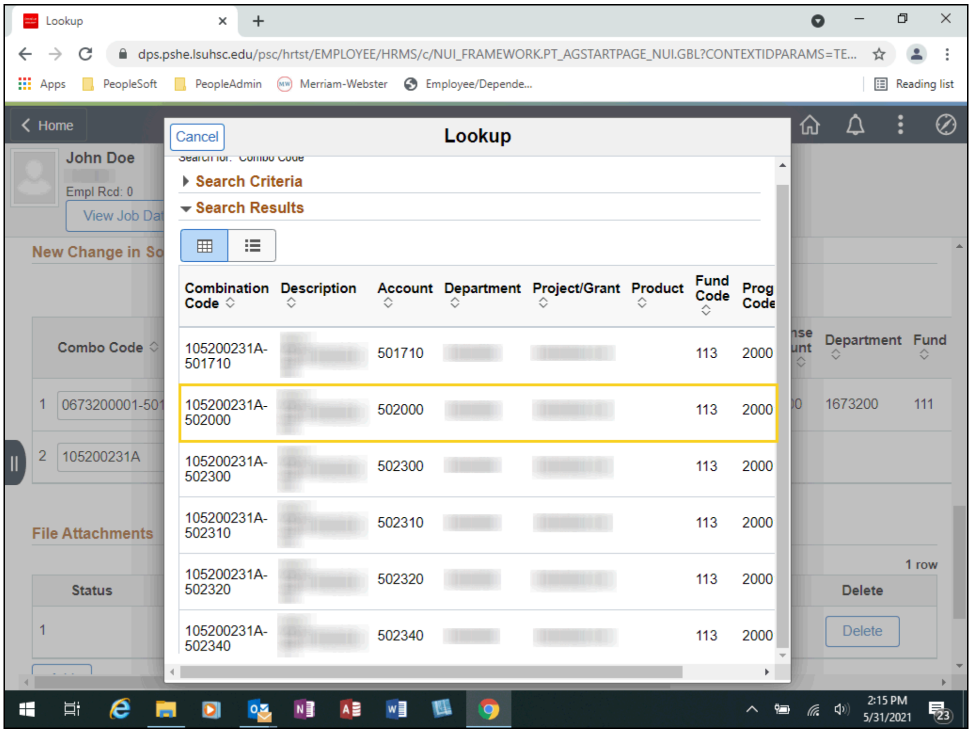
File Attachments

1 row

	Status	Action	Description	File Name	Delete
1		Upload			Delete

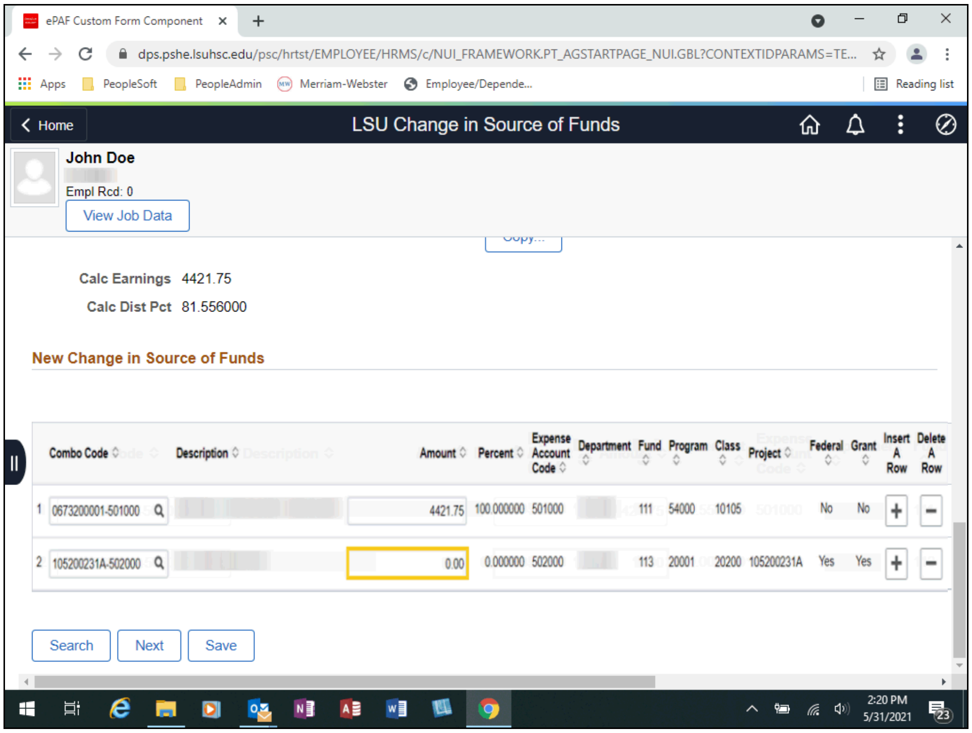
Add
2:03 PM
5/31/2021

Step	Action
25.	Enter the desired information into the **Amount** field. Enter "**4421.75**".
26.	You can only use the Account Code a person is set up under. The system will not allow you to cross Accounting Codes. Enter the desired information into the **Combo Code** field. Enter "**105200231A**".
27.	The *Combo Code* can be searched for by using the magnifying glass. Click the **Look up Combo Code** button. 🔍
28.	Scroll the **Down** with the mouse wheel.


Cancel
Lookup
Search for: Combo Code
Search Criteria
Search Results

Combination Code	Description	Account	Department	Project/Grant	Product	Fund Code	Prog Code
105200231A-501710	[redacted]	501710	[redacted]	[redacted]		113	2000
105200231A-502000	[redacted]	502000	[redacted]	[redacted]		113	2000
105200231A-502300	[redacted]	502300	[redacted]	[redacted]		113	2000
105200231A-502310	[redacted]	502310	[redacted]	[redacted]		113	2000
105200231A-502320	[redacted]	502320	[redacted]	[redacted]		113	2000
105200231A-502340	[redacted]	502340	[redacted]	[redacted]		113	2000

Step	Action
29.	Scroll the **105200231A-502000** button with the mouse wheel.


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
LSU Change in Source of Funds
View Job Data
Copy...
Search
Next
Save
2:20 PM
5/31/2021

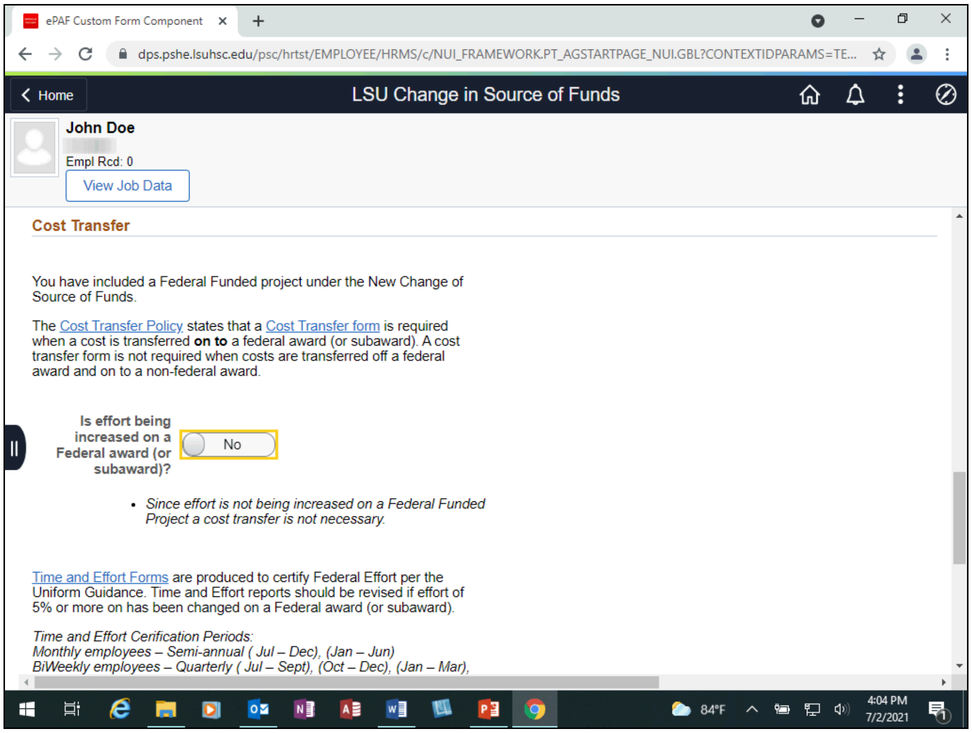
John Doe
[redacted]
Empl Rcd: 0

Calc Earnings 4421.75
Calc Dist Pct 81.556000

New Change in Source of Funds

	Combo Code	Description	Amount	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant	Insert A Row	Delete A Row
1	0673200001-501000	[redacted]	4421.75	100.000000	501000	[redacted]	111	54000	10105		No	No	+	−
2	105200231A-502000	[redacted]	0.00	0.000000	502000	[redacted]	113	20001	20200	105200231A	Yes	Yes	+	−

Step	Action
30.	**Amount** *Total Amount* *must* *match Total Earnings.* Enter the desired information into the **Amount** field. Enter "**1000.00**".
31.	Click the **Down** scrollbar.


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Home
LSU Change in Source of Funds
84°F
4:04 PM
7/2/2021

John Doe

Empl Rcd: 0

View Job Data

Cost Transfer

You have included a Federal Funded project under the New Change of Source of Funds.

The Cost Transfer Policy states that a Cost Transfer form is required when a cost is transferred **on to** a federal award (or subaward). A cost transfer form is not required when costs are transferred off a federal award and on to a non-federal award.

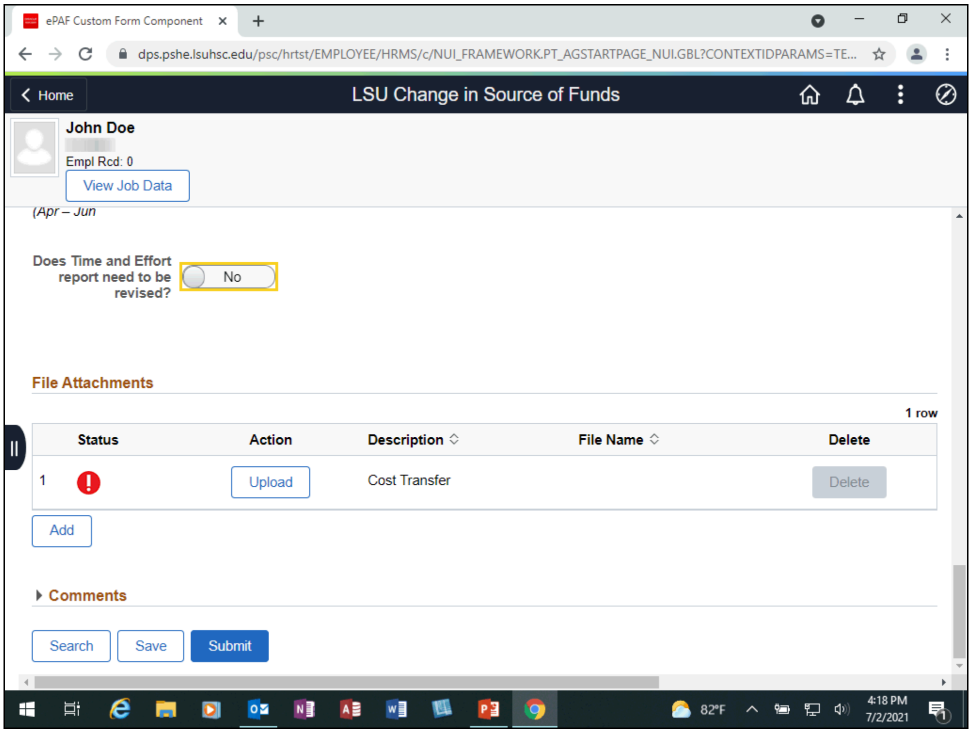
Is effort being increased on a Federal award (or subaward)? No

- *Since effort is not being increased on a Federal Funded Project a cost transfer is not necessary.*

Time and Effort Forms are produced to certify Federal Effort per the Uniform Guidance. Time and Effort reports should be revised if effort of 5% or more on has been changed on a Federal award (or subaward).

Time and Effort Cerification Periods:
Monthly employees – Semi-annual (Jul – Dec), (Jan – Jun)
BiWeekly employees – Quarterly (Jul – Sept), (Oct – Dec), (Jan – Mar),

Step	Action
32.	*Is effort being increased on a Federal award (or sub-award)?* This is a simple **Yes** or **No** answer. If **No**, a cost transfer is not necessary. Click the **Yes** option. No
33.	*Is effort being increased on a Federal award (or sub-award)?* If **Yes**, a cost transfer must be attached. Click the **Down** scrollbar. ▼



ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Home
LSU Change in Source of Funds
View Job Data
Add
Comments
Search
Save
Submit
82°F
4:18 PM
7/2/2021

John Doe
[redacted]
Empl Rcd: 0

(Apr – Jun

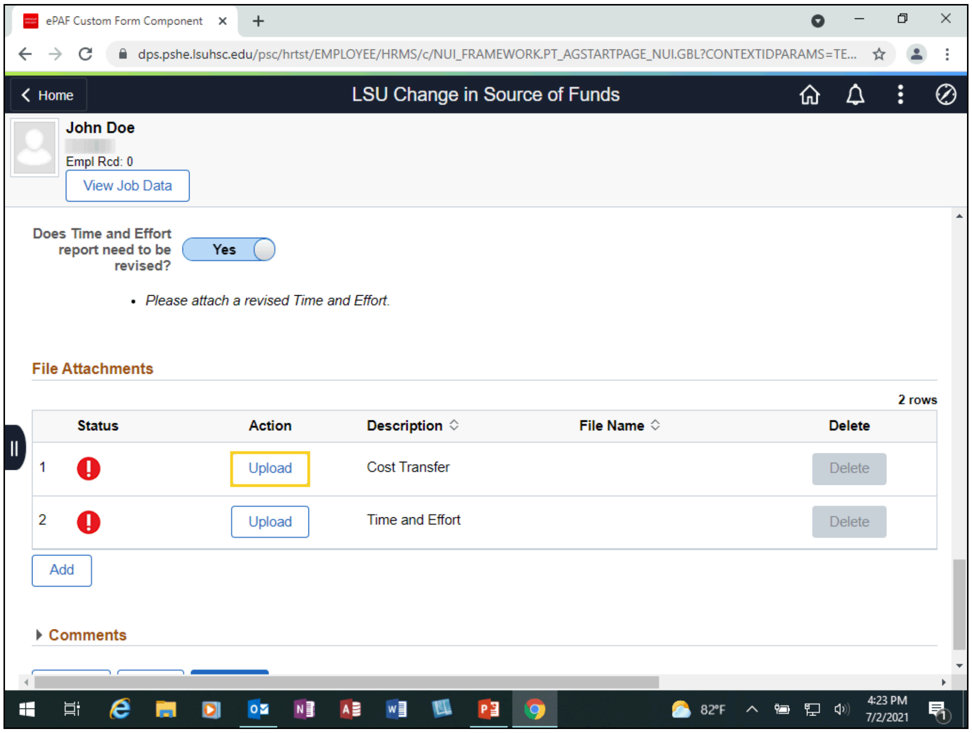
Does Time and Effort report need to be revised? No

File Attachments

1 row

	Status	Action	Description	File Name	Delete
1	!	Upload	Cost Transfer		Delete

Step	Action
34.	*Does Time and Effort report need to be revised?* This is a simple **Yes** or **No** answer. If **No**, a Time and Effort report does not need to be attached. Click the **Yes** option. No
35.	*Does Time and Effort report need to be revised?* If **Yes**, a revised Time and Effort report must be attached.


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Home
LSU Change in Source of Funds
John Doe
Empl Rcd: 0
View Job Data

Does Time and Effort report need to be revised? Yes

- *Please attach a revised Time and Effort.*

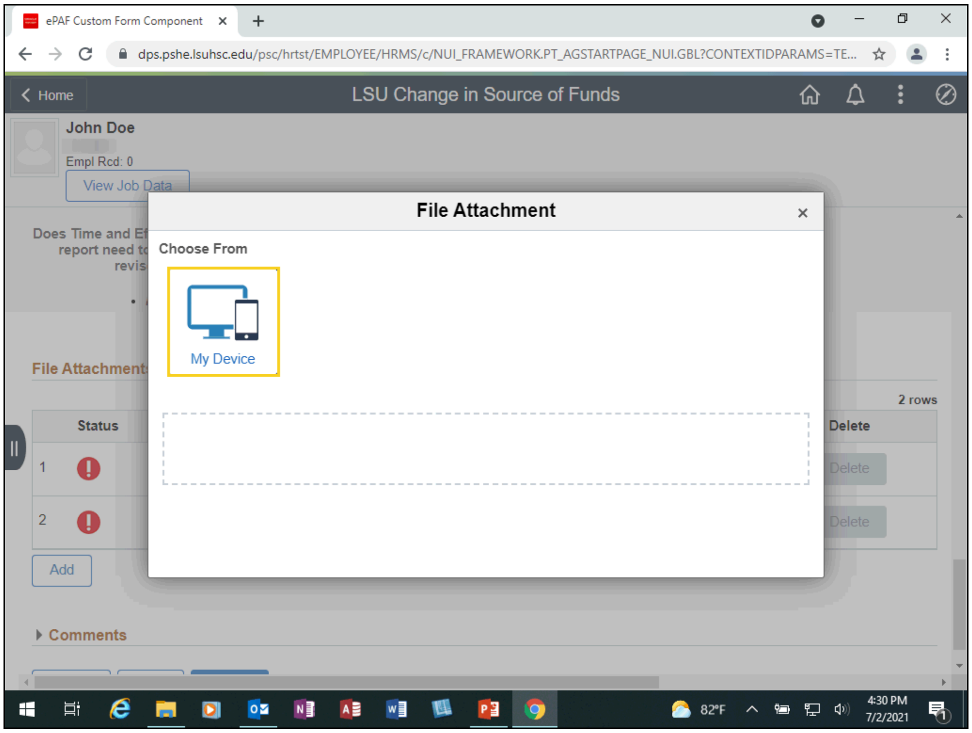
File Attachments

2 rows

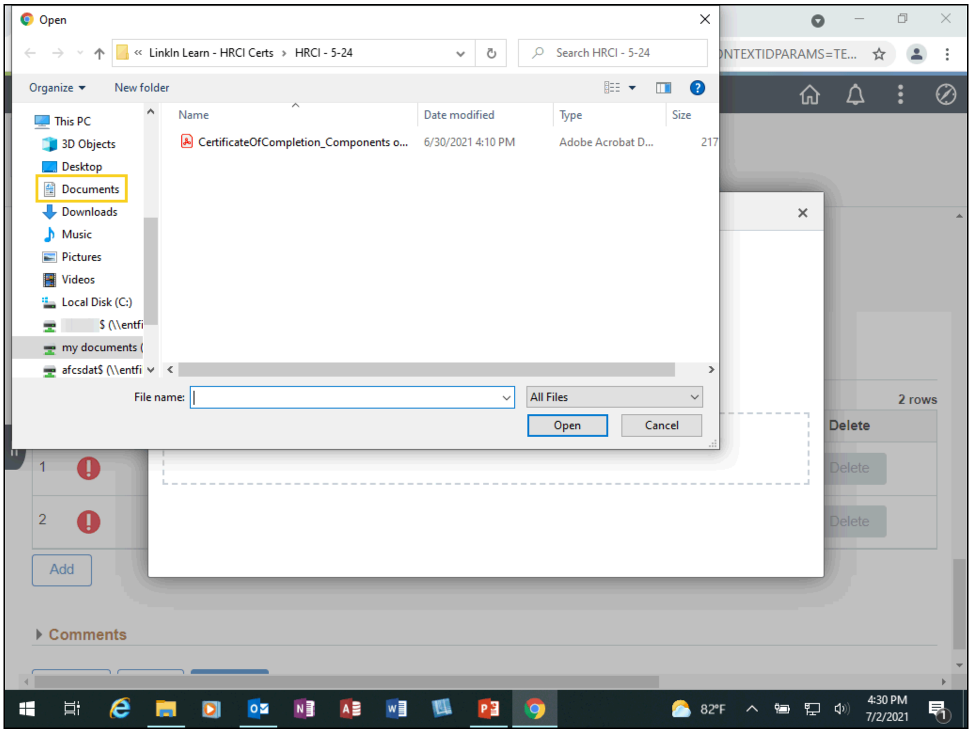
	Status	Action	Description	File Name	Delete
1	!	Upload	Cost Transfer		Delete
2	!	Upload	Time and Effort		Delete

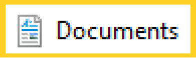
Add
Comments
82°F
4:23 PM
7/2/2021

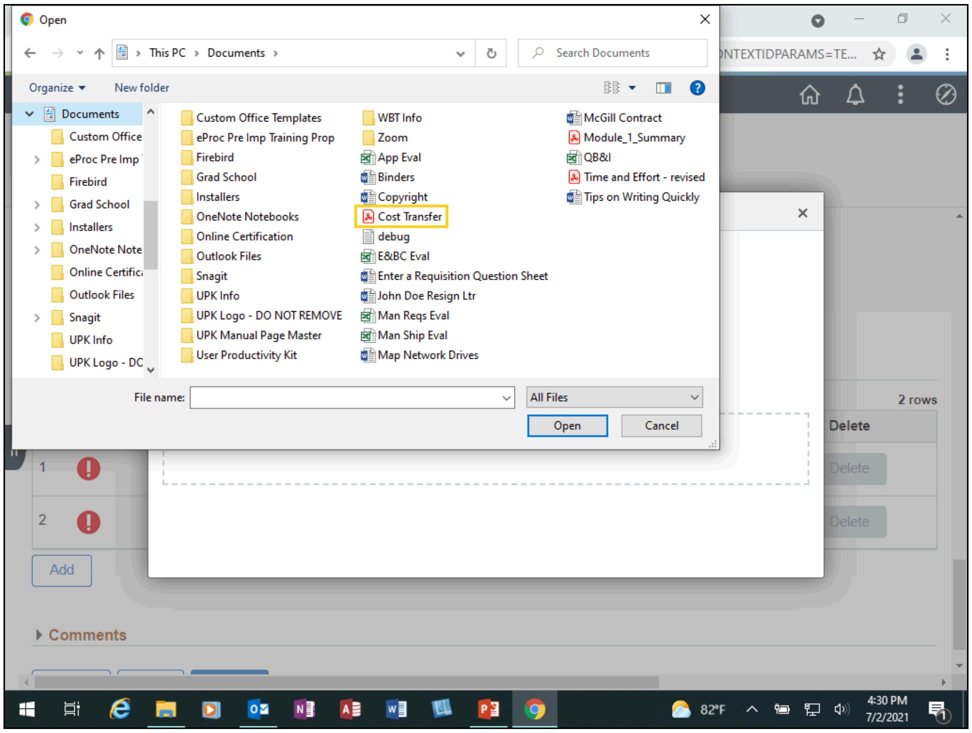
Step	Action
36.	Click the **Upload Cost Transfer** button. Upload

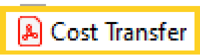

ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Home
LSU Change in Source of Funds
John Doe
Empl Rcd: 0
View Job Data
File Attachment
Choose From
My Device
File Attachments
2 rows
Status
Delete
1
2
Delete
Delete
Add
Comments
82°F
4:30 PM
7/2/2021

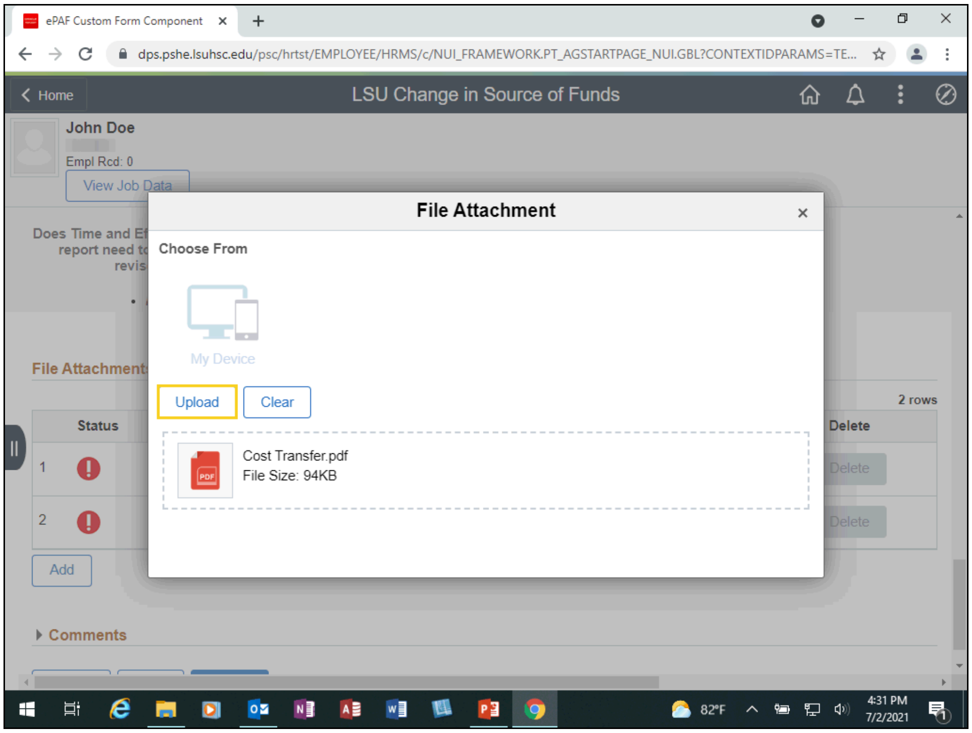
Step	Action
37.	Click the **My Device** button.


Open
« LinkIn Learn - HRCI Certs › HRCI - 5-24
Search HRCI - 5-24
ONTEXTIDPARAMS=TE...
Organize
New folder
This PC
3D Objects
Desktop
Documents
Downloads
Music
Pictures
Videos
Local Disk (C:)
$ (\\entfi
my documents (
afcsdat$ (\\entfi
Name
Date modified
Type
Size
CertificateOfCompletion_Components o...
6/30/2021 4:10 PM
Adobe Acrobat D...
217
File name:
All Files
Open
Cancel
2 rows
Delete
Delete
Delete
1
2
Add
Comments
82°F
4:30 PM
7/2/2021

Step	Action
38.	Click the **Documents** menu. 


Open
This PC › Documents ›
Search Documents
Organize ▾
New folder
Documents
Custom Office
eProc Pre Imp
Firebird
Grad School
Installers
OneNote Note
Online Certific
Outlook Files
Snagit
UPK Info
UPK Logo - DC
Custom Office Templates
eProc Pre Imp Training Prop
Firebird
Grad School
Installers
OneNote Notebooks
Online Certification
Outlook Files
Snagit
UPK Info
UPK Logo - DO NOT REMOVE
UPK Manual Page Master
User Productivity Kit
WBT Info
Zoom
App Eval
Binders
Copyright
Cost Transfer
debug
E&BC Eval
Enter a Requisition Question Sheet
John Doe Resign Ltr
Man Reqs Eval
Man Ship Eval
Map Network Drives
McGill Contract
Module_1_Summary
QB&I
Time and Effort - revised
Tips on Writing Quickly
File name:
All Files
Open
Cancel
2 rows
Delete
1
2
Add
Comments
82°F
4:30 PM
7/2/2021

Step	Action
39.	Click the **Cost Transfer** link.  Cost Transfer
40.	Click the **Open** button.


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
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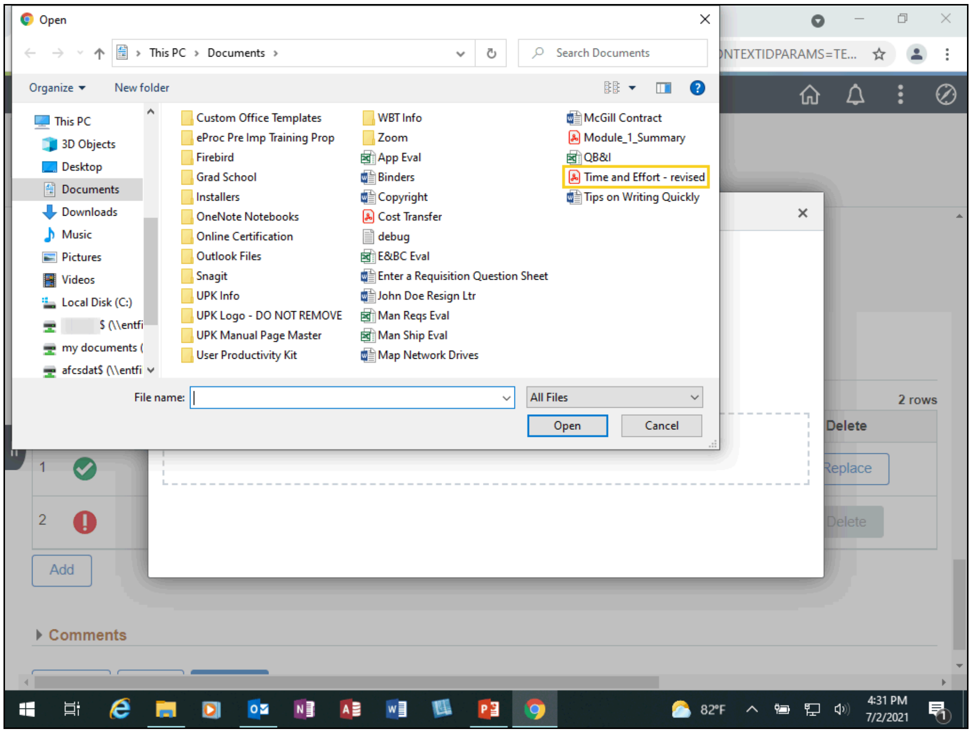
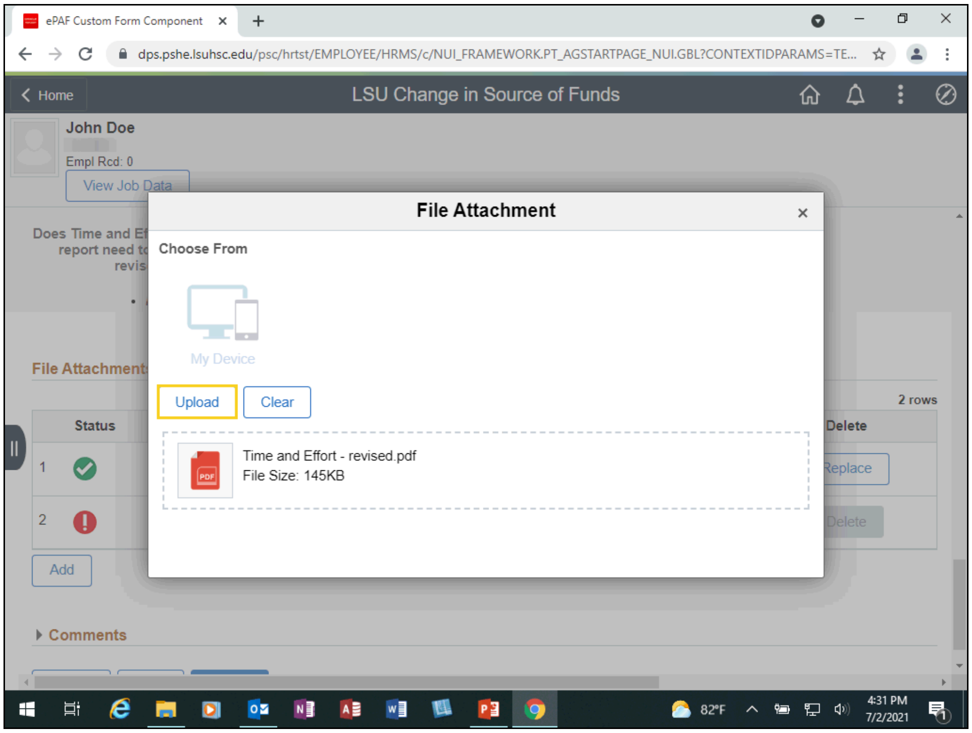
LSU Change in Source of Funds
John Doe
Empl Rcd: 0
View Job Data
Does Time and Ef
report need t
revis
File Attachment
Status
1
2
Add
Comments
2 rows
Delete
Delete
Delete
File Attachment
Choose From
My Device
Upload
Clear
Cost Transfer.pdf
File Size: 94KB
82°F
4:31 PM
7/2/2021

Step	Action
41.	Click the **Upload** button. Upload
42.	Click the **Done** button. Done
43.	Click the **Upload Time and Effort** button. Upload
44.	Click the **My Device** button.


Open
This PC › Documents ›
Search Documents
Organize
New folder
This PC
3D Objects
Desktop
Documents
Downloads
Music
Pictures
Videos
Local Disk (C:)
$ (\\entfi
my documents (
afcsdat$ (\\entfi
Custom Office Templates
eProc Pre Imp Training Prop
Firebird
Grad School
Installers
OneNote Notebooks
Online Certification
Outlook Files
Snagit
UPK Info
UPK Logo - DO NOT REMOVE
UPK Manual Page Master
User Productivity Kit
WBT Info
Zoom
App Eval
Binders
Copyright
Cost Transfer
debug
E&BC Eval
Enter a Requisition Question Sheet
John Doe Resign Ltr
Man Reqs Eval
Man Ship Eval
Map Network Drives
McGill Contract
Module_1_Summary
QB&I
Time and Effort - revised
Tips on Writing Quickly
File name:
All Files
Open
Cancel
NTEXTIDPARAMS=TE...
2 rows
Delete
Replace
Delete
1
2
Add
Comments
82°F
4:31 PM
7/2/2021

Step	Action
45.	Click the **Time and Effort - revised** link. Time and Effort - revised
46.	Click the **Open** button. Open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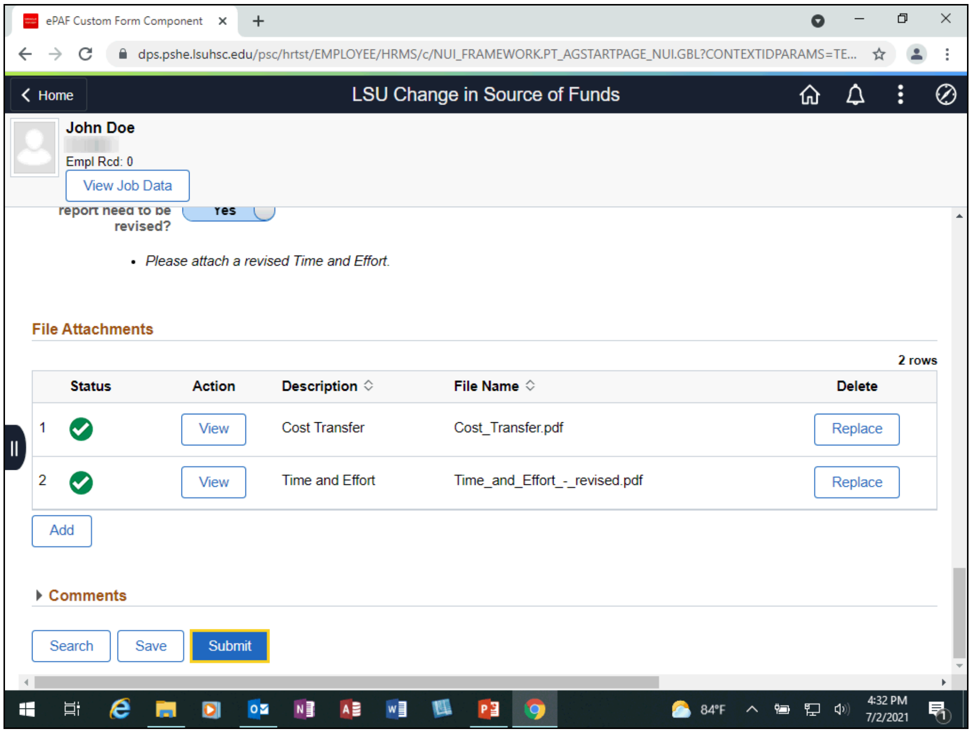
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Home
LSU Change in Source of Funds
John Doe
Empl Rcd: 0
View Job Data
Does Time and Ef
report need to
revis
File Attachments
Status
2 rows
Delete
Replace
Delete
Add
Comments
File Attachment
Choose From
My Device
Upload
Clear
82°F
4:31 PM
7/2/2021

Time and Effort - revised.pdf
File Size: 145KB

Step	Action
47.	Click the **Upload** button. Upload
48.	Click the **Done** button. Done


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Home
LSU Change in Source of Funds
View Job Data
Add
Comments
Search
Save
Submit
84°F
4:32 PM
7/2/2021

John Doe
Empl Rcd: 0

report need to be revised? Yes

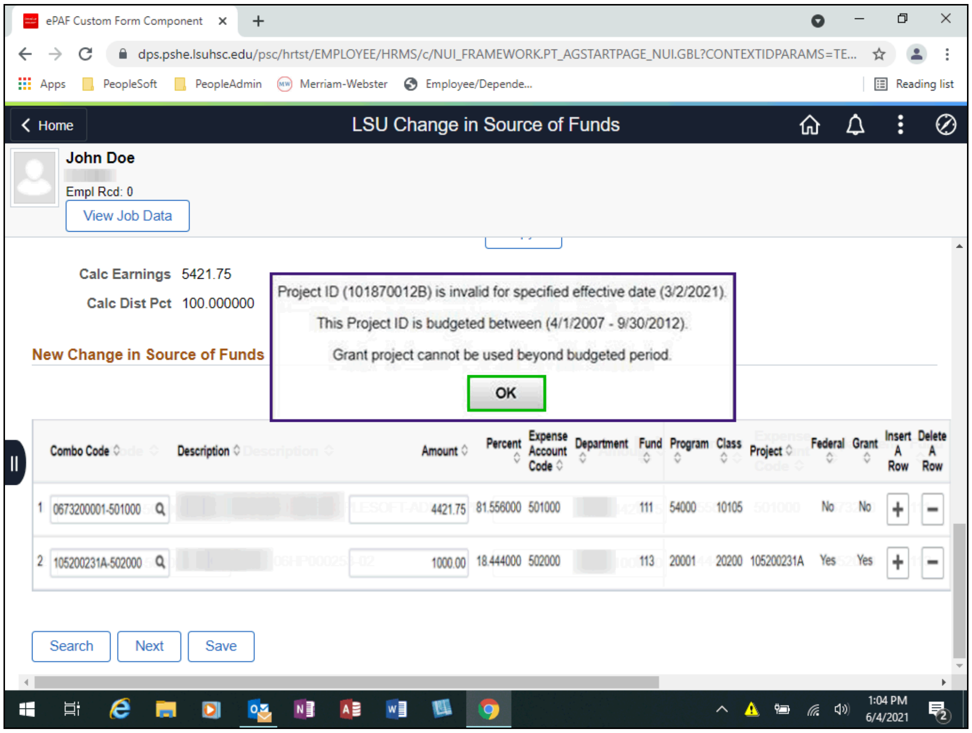
- *Please attach a revised Time and Effort.*

File Attachments

2 rows

	Status	Action	Description	File Name	Delete
1	✓	View	Cost Transfer	Cost_Transfer.pdf	Replace
2	✓	View	Time and Effort	Time_and_Effort_-_revised.pdf	Replace

Step	Action
49.	Click the **Submit** button. Submit


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
LSU Change in Source of Funds
View Job Data
OK
Search
Next
Save
1:04 PM
6/4/2021

John Doe
[redacted]
Empl Rcd: 0

Calc Earnings 5421.75
Calc Dist Pct 100.000000

Project ID (101870012B) is invalid for specified effective date (3/2/2021).

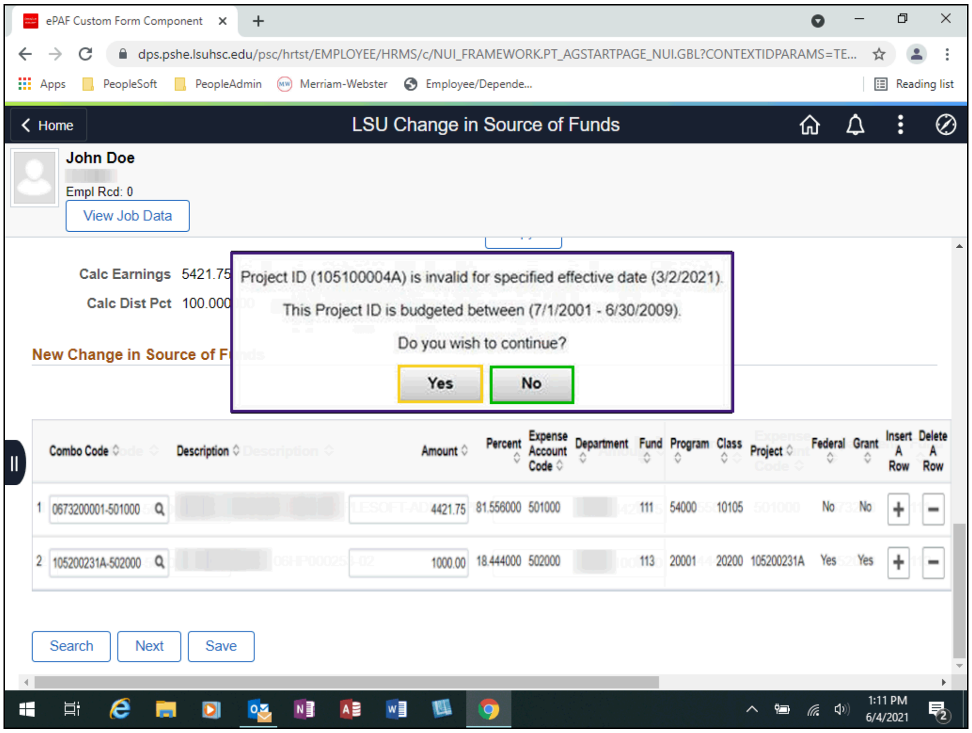
This Project ID is budgeted between (4/1/2007 - 9/30/2012).

Grant project cannot be used beyond budgeted period.

New Change in Source of Funds

	Combo Code	Description	Amount	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant	Insert A Row	Delete A Row
1	0673200001-501000	[redacted]	4421.75	81.556000	501000	[redacted]	111	54000	10105		No	No	+	−
2	105200231A-502000	[redacted]	1000.00	18.444000	502000	[redacted]	113	20001	20200	105200231A	Yes	Yes	+	−

Step	Action
50.	Only a project that is in the effective date range for the period adjusting will be allowed. An error message will appear if the project is out of date range. ***NOTE: This message will display after clicking the "Next" button at the bottom of the page.***


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
LSU Change in Source of Funds
View Job Data
Yes
No
Search
Next
Save
1:11 PM
6/4/2021

John Doe
[redacted]
Empl Rcd: 0

Calc Earnings 5421.75
Calc Dist Pct 100.000

Project ID (105100004A) is invalid for specified effective date (3/2/2021).

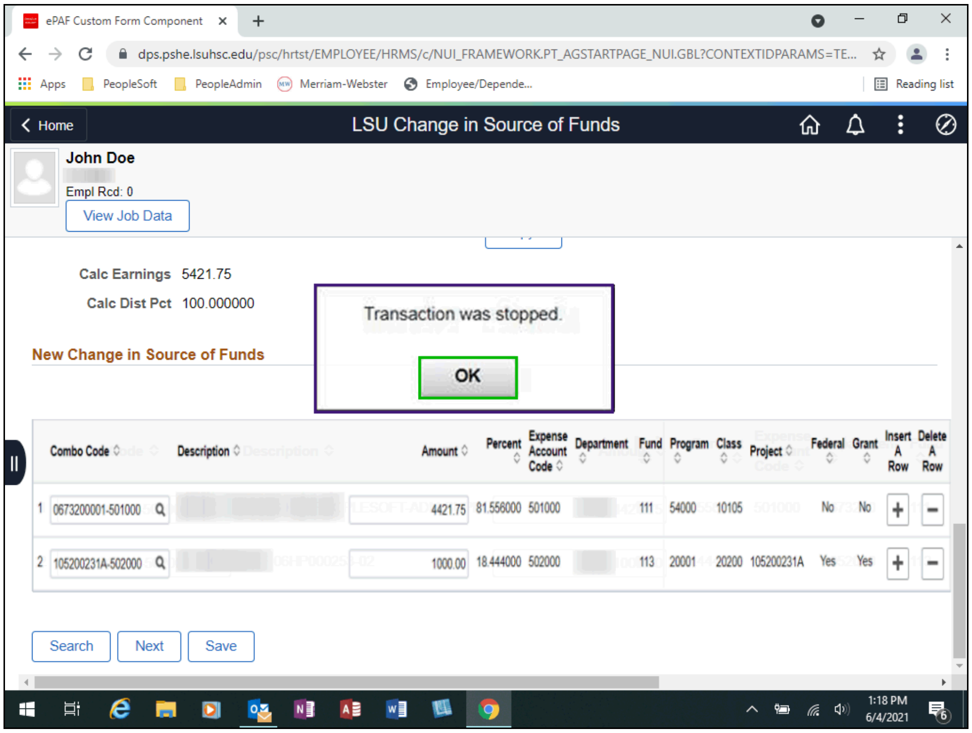
This Project ID is budgeted between (7/1/2001 - 6/30/2009).

Do you wish to continue?

New Change in Source of Funds

	Combo Code	Description	Amount	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant	Insert A Row	Delete A Row
1	0673200001-501000	[redacted]	4421.75	81.556000	501000	[redacted]	111	54000	10105		No	No	+	−
2	105200231A-502000	[redacted]	1000.00	18.444000	502000	[redacted]	113	20001	20200	105200231A	Yes	Yes	+	−

Step	Action
51.	**Non-Grant Project Warning Message** A message for a *Non-Grant Project* will give a warning and option to stop or continue if specified effective date is invalid. ***NOTE: This message will display after clicking the "Next" button at the bottom of the page.*** If "**Yes**" is selected, continue with Submission/Approval for the form.


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
LSU Change in Source of Funds
View Job Data
OK
Search
Next
Save
1:18 PM
6/4/2021

John Doe
[redacted]
Empl Rcd: 0

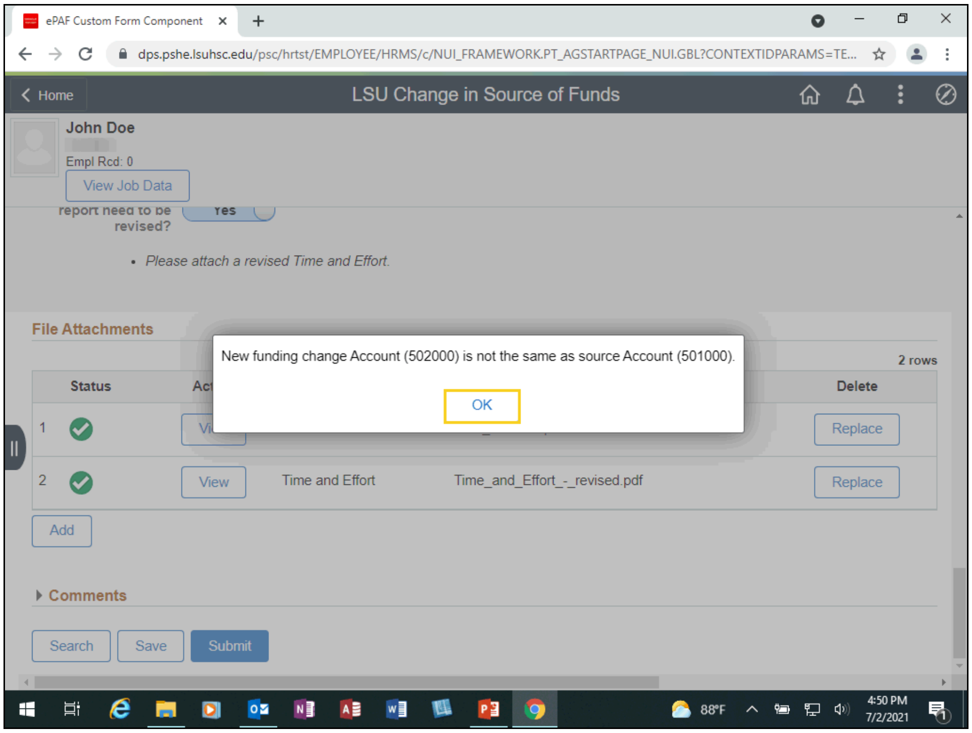
Calc Earnings 5421.75
Calc Dist Pct 100.000000

New Change in Source of Funds

Transaction was stopped.

	Combo Code	Description	Amount	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant	Insert A Row	Delete A Row
1	0673200001-501000	[redacted]	4421.75	81.556000	501000	[redacted]	111	54000	10105		No	No	+	−
2	105200231A-502000	[redacted]	1000.00	18.444000	502000	[redacted]	113	20001	20200	105200231A	Yes	Yes	+	−

Step	Action
52.	**Non-Grant Project Warning Message** If "**No**" is selected, a message will display stating the transaction was stopped.


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Home
LSU Change in Source of Funds
View Job Data
Yes
File Attachments
Status
Act
Delete
Vi
View
Replace
Add
Comments
Search
Save
Submit
88°F
4:50 PM
7/2/2021

John Doe
[redacted]
Empl Rcd: 0

report need to be revised?

- *Please attach a revised Time and Effort.*

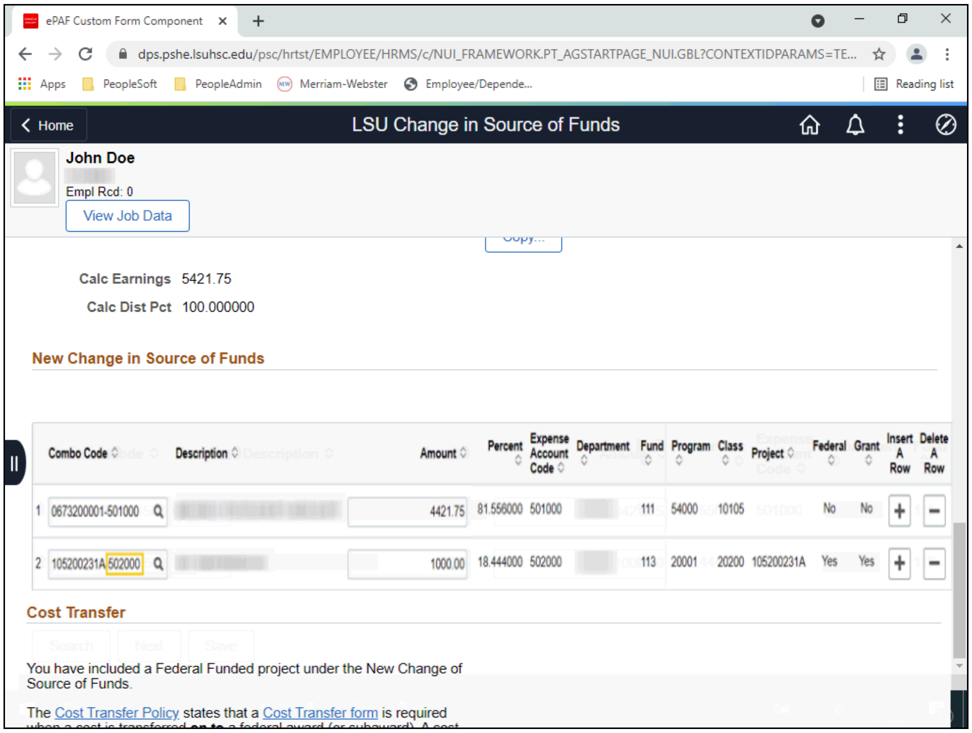
2 rows

	Status	Act			Delete
1	✓	Vi			Replace
2	✓	View	Time and Effort	Time_and_Effort_-_revised.pdf	Replace

New funding change Account (502000) is not the same as source Account (501000).

OK

Step	Action
53.	A message displays if the new funding change account is different from the original funding account. The new funding change account cannot use more than one Account. Click the **OK** button. OK


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
LSU Change in Source of Funds
View Job Data
Copy...

John Doe
[redacted]
Empl Rcd: 0

Calc Earnings 5421.75
Calc Dist Pct 100.000000

New Change in Source of Funds

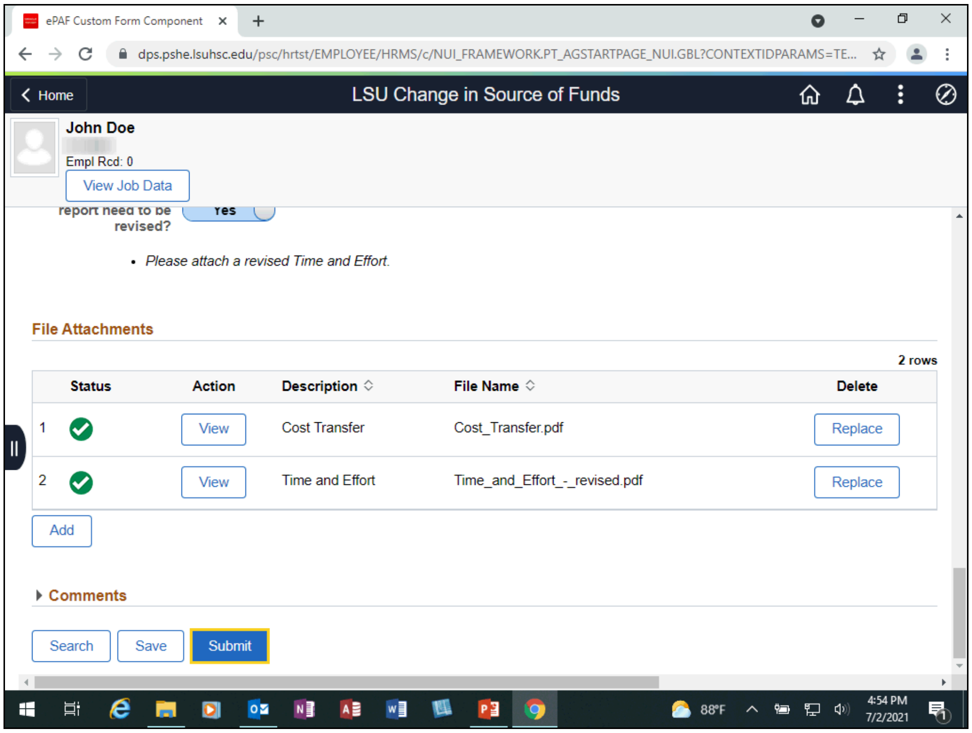
	Combo Code	Description	Amount	Percent	Expense Account Code	Department	Fund	Program	Class	Project	Federal	Grant	Insert A Row	Delete A Row
1	0673200001-501000	[redacted]	4421.75	81.556000	501000	[redacted]	111	54000	10105		No	No	+	−
2	105200231A 502000	[redacted]	1000.00	18.444000	502000	[redacted]	113	20001	20200	105200231A	Yes	Yes	+	−

Cost Transfer

You have included a Federal Funded project under the New Change of Source of Funds.

The Cost Transfer Policy states that a Cost Transfer form is required

Step	Action
54.	Change the *Account* number for the **Combo Code** from *502000* to *501000*. Make sure there is a hyphen between the Project/Grant number and the Account number. Enter the desired information into the **Combo Code** field. Enter "**501000**".
55.	**Federal/Grant** *Cost Transfer* will be available for input if Combo Code is "**Federal**".
56.	**Retro Restrictions** Retro restrictions prevent conflict with on-cycle payroll processing. Restriction will be triggered when all of the following conditions are met: • **On-Cycle Payroll** • **Pay Confirm Run** • **GL Processing (PAYGL02) is NOT done** An *Error* notification email will be sent to DEV and Support Group to verify the error was intended. Once Payroll finishes on-cycle processing, Support will bring up the form ID and "*Resubmit MSG.*" Post-processing for Retro requests will resume and Notifications will be sent to all participants upon completion.


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Home
LSU Change in Source of Funds
View Job Data
Yes
View
Replace
Add
Search
Save
Submit
88°F
4:54 PM
7/2/2021

John Doe
Empl Rcd: 0

report need to be revised?

- *Please attach a revised Time and Effort.*

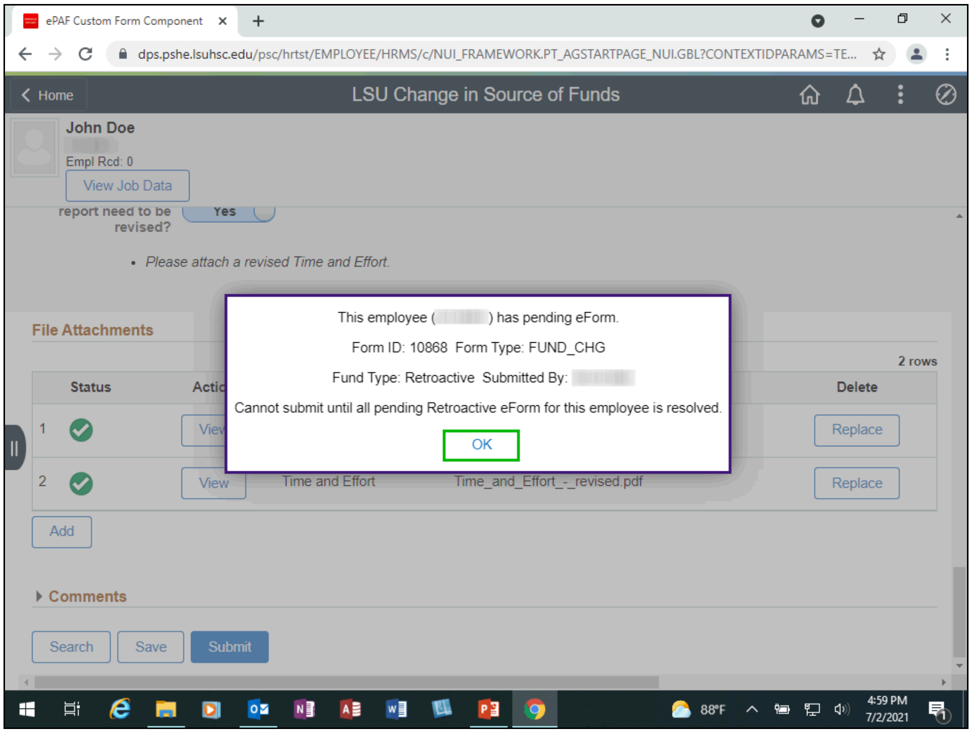
File Attachments

2 rows

	Status	Action	Description	File Name	Delete
1	✓	View	Cost Transfer	Cost_Transfer.pdf	Replace
2	✓	View	Time and Effort	Time_and_Effort_-_revised.pdf	Replace

Comments

Step	Action
57.	Click the **Submit** button. Submit


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Home
LSU Change in Source of Funds
View Job Data
File Attachments
2 rows
Status
Actio
Delete
View
Replace
Add
Comments
Search
Save
Submit
OK
88°F
4:59 PM
7/2/2021

John Doe
[redacted]
Empl Rcd: 0

report need to be revised? Yes

- Please attach a revised Time and Effort.

This employee ([redacted]) has pending eForm.

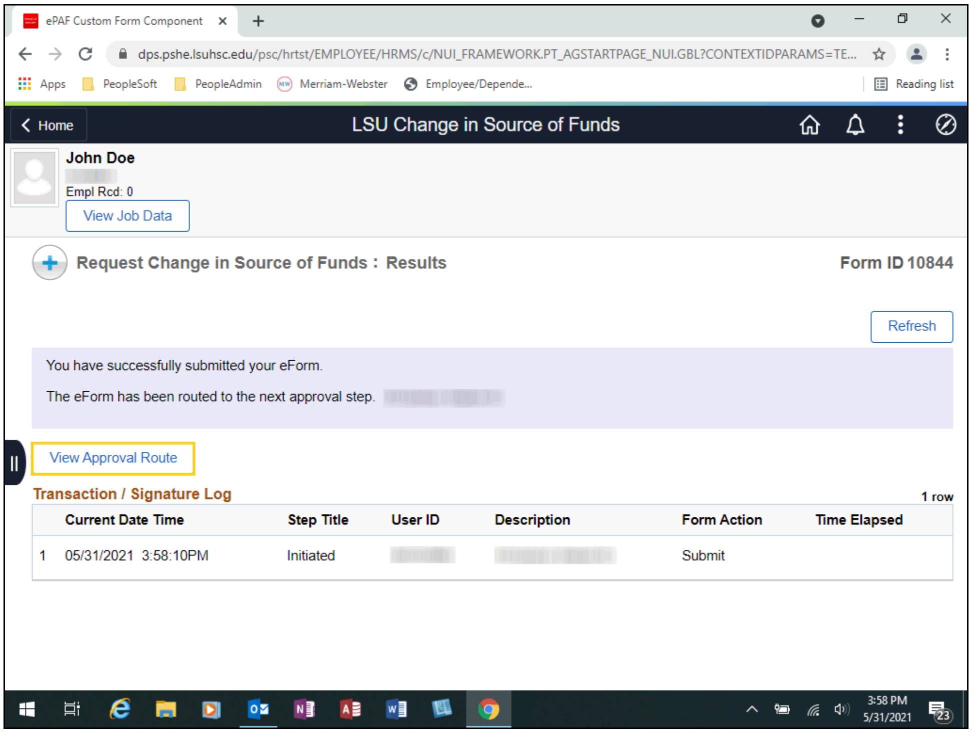
Form ID: 10868 Form Type: FUND_CHG

Fund Type: Retroactive Submitted By: [redacted]

Cannot submit until all pending Retroactive eForm for this employee is resolved.

	Status	Actio			Delete
1	✓	View			Replace
2	✓	View	Time and Effort	Time_and_Effort_-_revised.pdf	Replace

Step	Action
58.	***NOTE: The system will only allow one (1) pending Prospective and one (1) Retroactive PER.*** You cannot submit a new form for an employee with an outstanding funding change form for either Retro or Prospective.


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Home
LSU Change in Source of Funds
View Job Data
Refresh
View Approval Route
3:58 PM
5/31/2021

John Doe
[redacted]
Empl Rcd: 0

Request Change in Source of Funds : Results

Form ID 10844

You have successfully submitted your eForm.

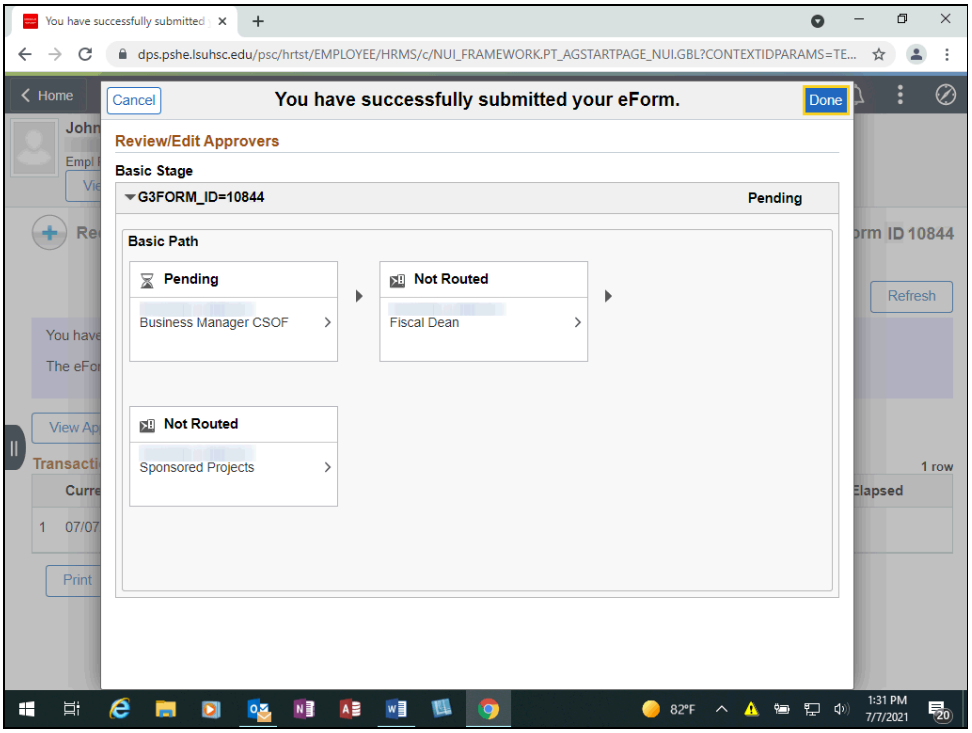
The eForm has been routed to the next approval step. [redacted]

Transaction / Signature Log

1 row

	Current Date Time	Step Title	User ID	Description	Form Action	Time Elapsed
1	05/31/2021 3:58:10PM	Initiated	[redacted]	[redacted]	Submit	

Step	Action
59.	A message displays stating your PER has successfully been submitted. Click the **View Approval Route** button. View Approval Route



You have successfully submitted your eForm.

Review/Edit Approvers

Basic Stage

G3FORM_ID=10844 Pending

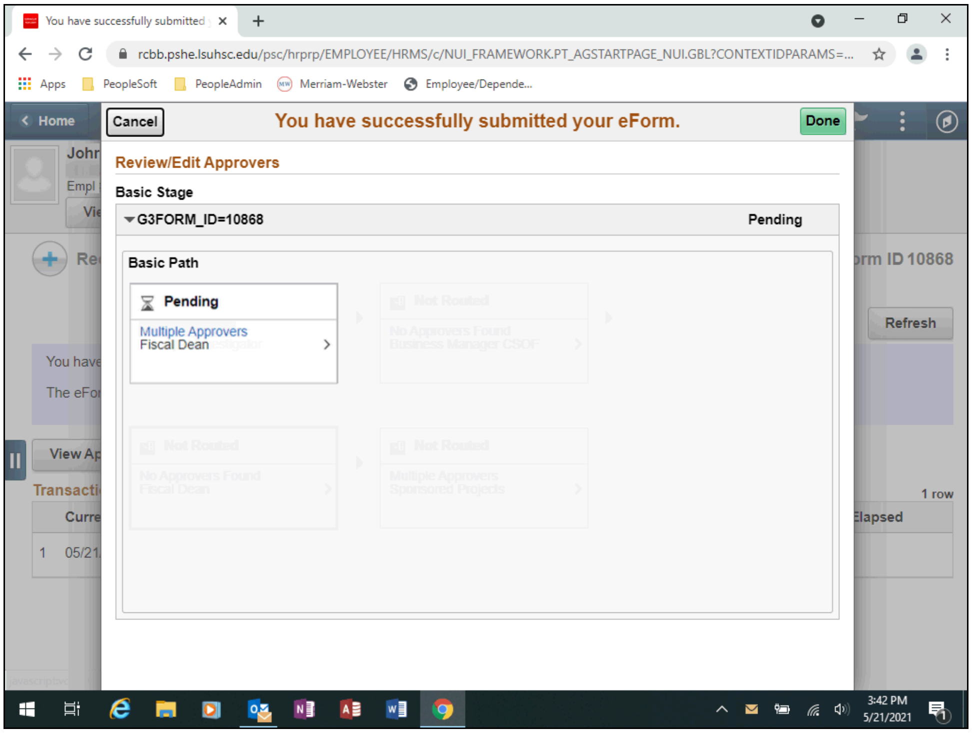
Basic Path

Pending
[redacted]
Business Manager CSOF

Not Routed
[redacted]
Fiscal Dean

Not Routed
[redacted]
Sponsored Projects

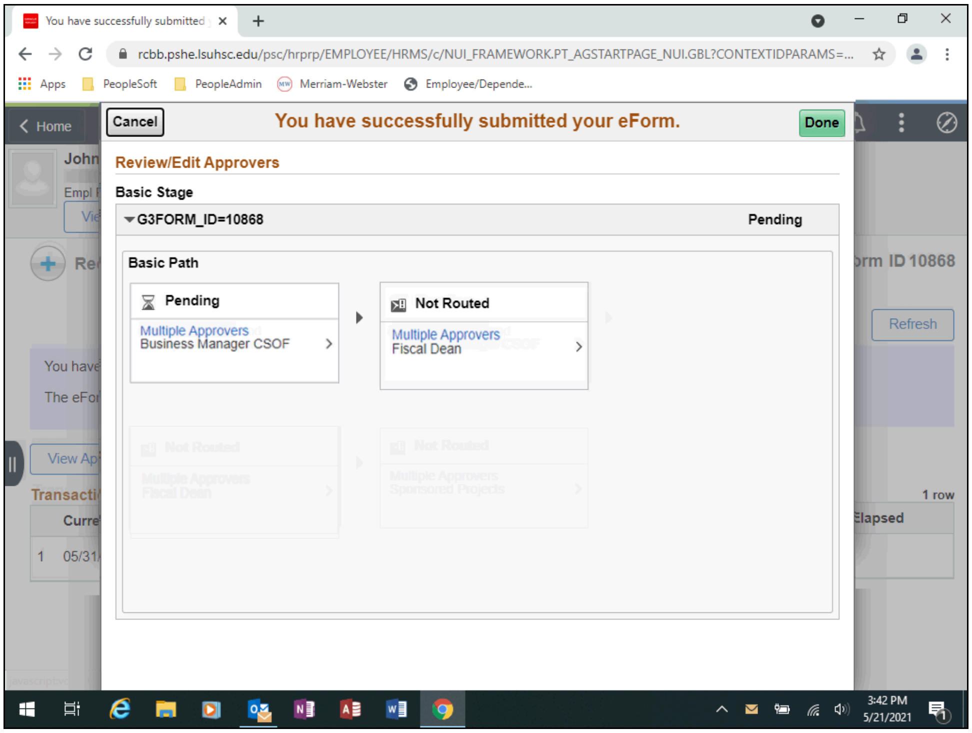
Step	Action
60.	**Submitter is CSOF Business Manager** The Approval Routing for Retroactive Requests that contain *Federal* and *Grant* accounts is shown here. Click the **Done** button. Done



You have successfully submitted your eForm.

rcbb.pshe.lsuhsc.edu/psc/hrprp/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Home
Cancel
Done
Review/Edit Approvers
Basic Stage
G3FORM_ID=10868
Pending
Basic Path
Pending
Multiple Approvers
Fiscal Dean
Not Routed
No Approvers Found
Business Manager CSOF
Not Routed
No Approvers Found
Fiscal Dean
Not Routed
Multiple Approvers
Sponsored Projects
Refresh
1 row
Elapsed
3:42 PM
5/21/2021

Step	Action
61.	**Submitter is CSOF Business Manager** The Approval Routing for Retroactive Requests that do not contain *Federal* or *Grant* accounts is shown here.



You have successfully submitted your eForm.

Review/Edit Approvers

Basic Stage

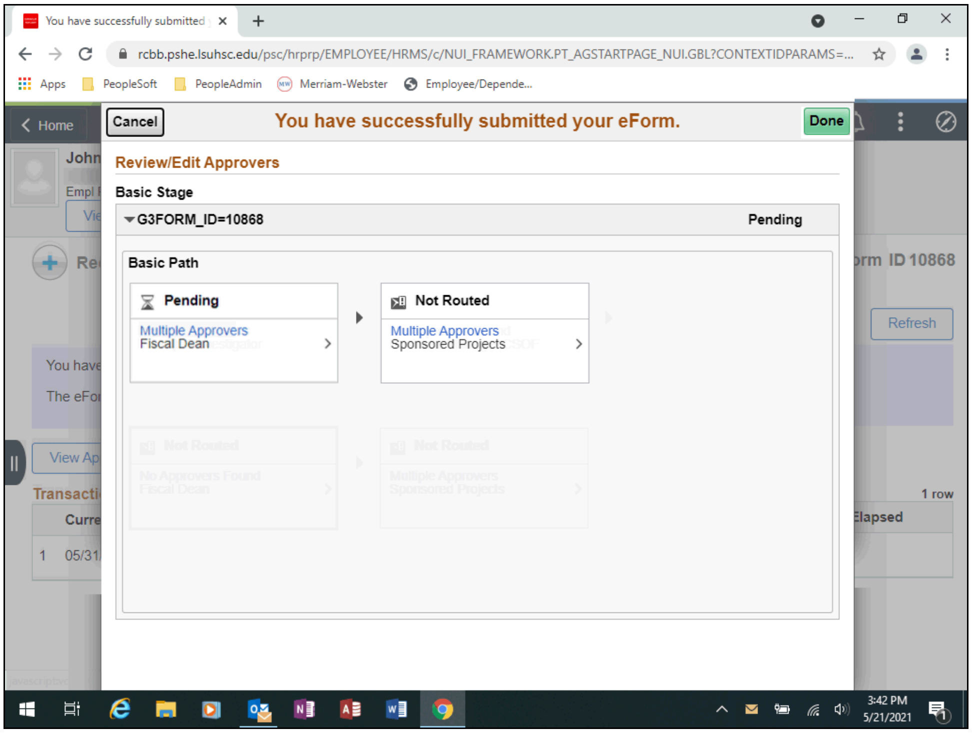
G3FORM_ID=10868 Pending

Basic Path

Pending
Multiple Approvers
Business Manager CSOF

Not Routed
Multiple Approvers
Fiscal Dean

Step	Action
62.	**Submitter is CSOF Business Manager** The Approval Routing for Retroactive Requests that contain *Federal* accounts, but do not contain *Grant* accounts, is shown here.


You have successfully submitted
rcbb.pshe.lsuhsc.edu/psc/hrprp/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Home
Cancel
Done
Refresh
3:42 PM
5/21/2021

You have successfully submitted your eForm.

Review/Edit Approvers

Basic Stage

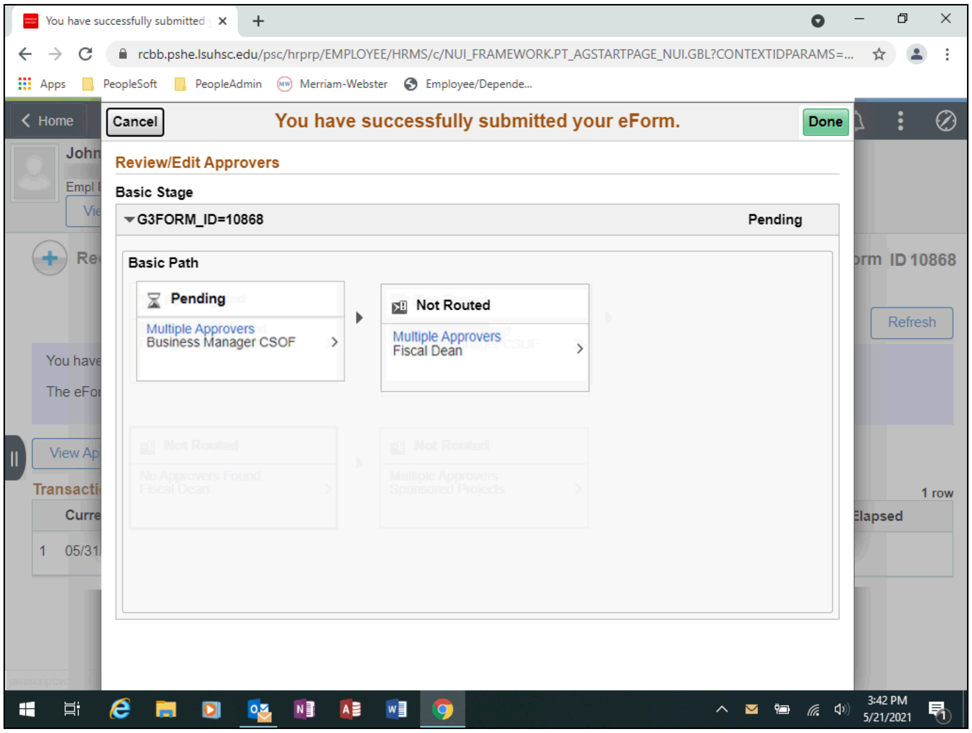
G3FORM_ID=10868 Pending

Basic Path

Pending
Multiple Approvers
Fiscal Dean

Not Routed
Multiple Approvers
Sponsored Projects

Step	Action
63.	**Submitter is CSOF Business Manager** The Approval Routing for Retroactive Requests that do not contain *Federal* accounts, but do contain *Grant* accounts is shown here.



You have successfully submitted your eForm.

Review/Edit Approvers

Basic Stage

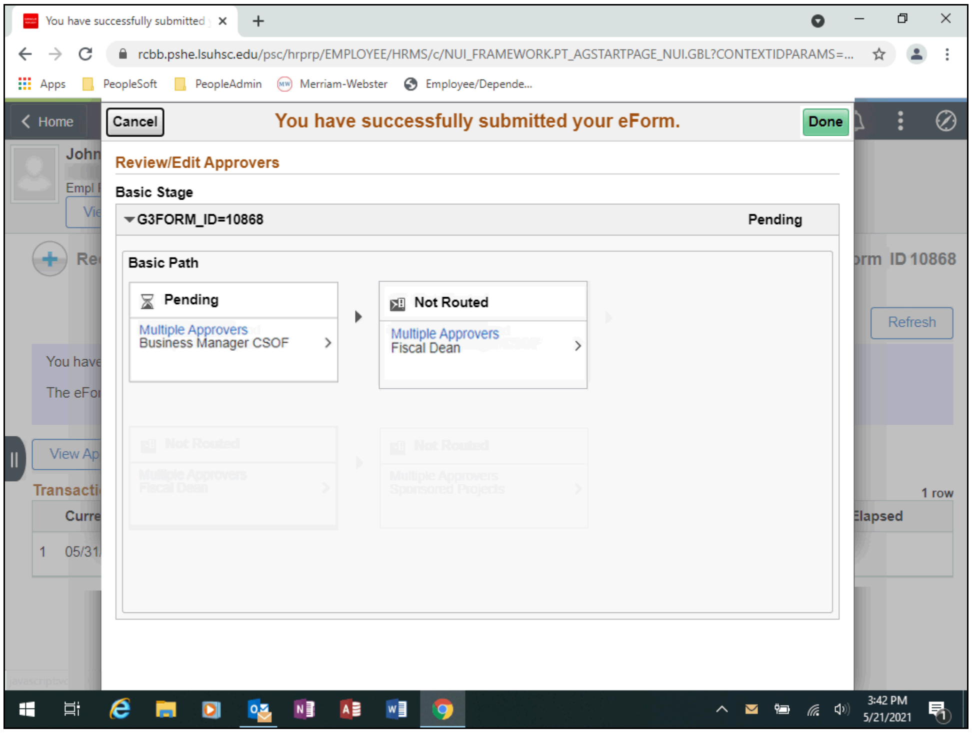
G3FORM_ID=10868 Pending

Basic Path

Pending
Multiple Approvers
Business Manager CSOF

Not Routed
Multiple Approvers
Fiscal Dean

Step	Action
64.	**Submitter is NOT CSOF Business Manager** The Approval Routing for Retroactive Requests that do not contain *Federal* or *Grant* accounts is shown here.


Home
Cancel
Done
Refresh
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
3:42 PM
5/21/2021

You have successfully submitted your eForm.

Review/Edit Approvers

Basic Stage

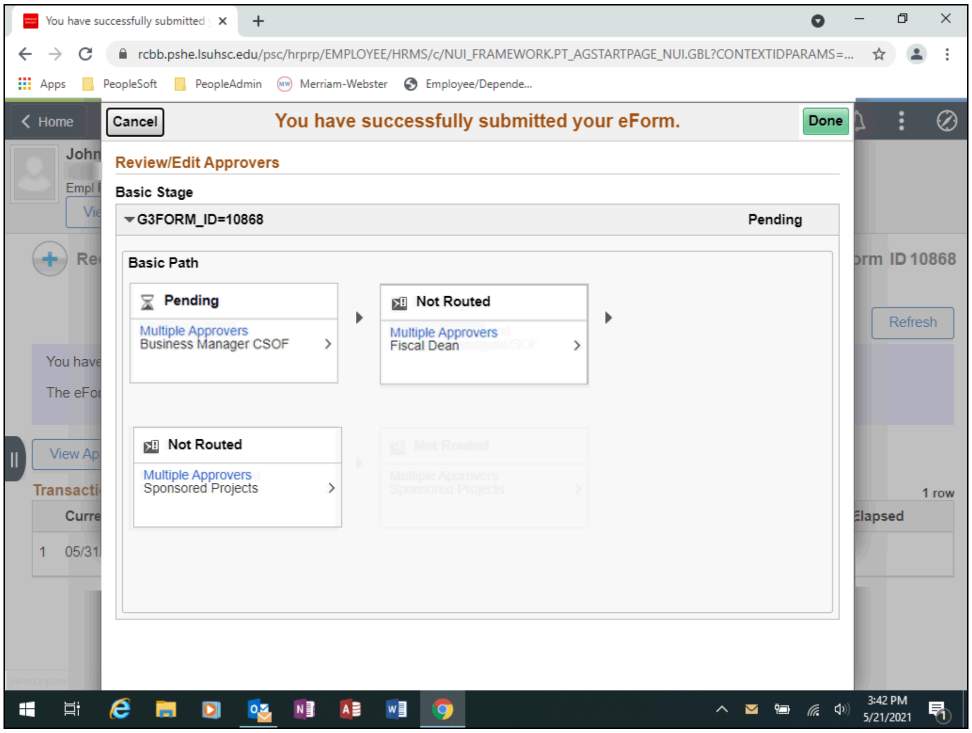
G3FORM_ID=10868 Pending

Basic Path

Pending
Multiple Approvers
Business Manager CSOF

Not Routed
Multiple Approvers
Fiscal Dean

Step	Action
65.	**Submitter is NOT CSOF Business Manager** The Approval Routing for Retroactive Requests that contain *Federal* accounts, but do not contain *Grant* accounts, is shown here.



You have successfully submitted
rcbb.pshe.lsuhsc.edu/psc/hrprp/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Home
Cancel
Done
Refresh
3:42 PM
5/21/2021

You have successfully submitted your eForm.

Review/Edit Approvers

Basic Stage

G3FORM_ID=10868 Pending

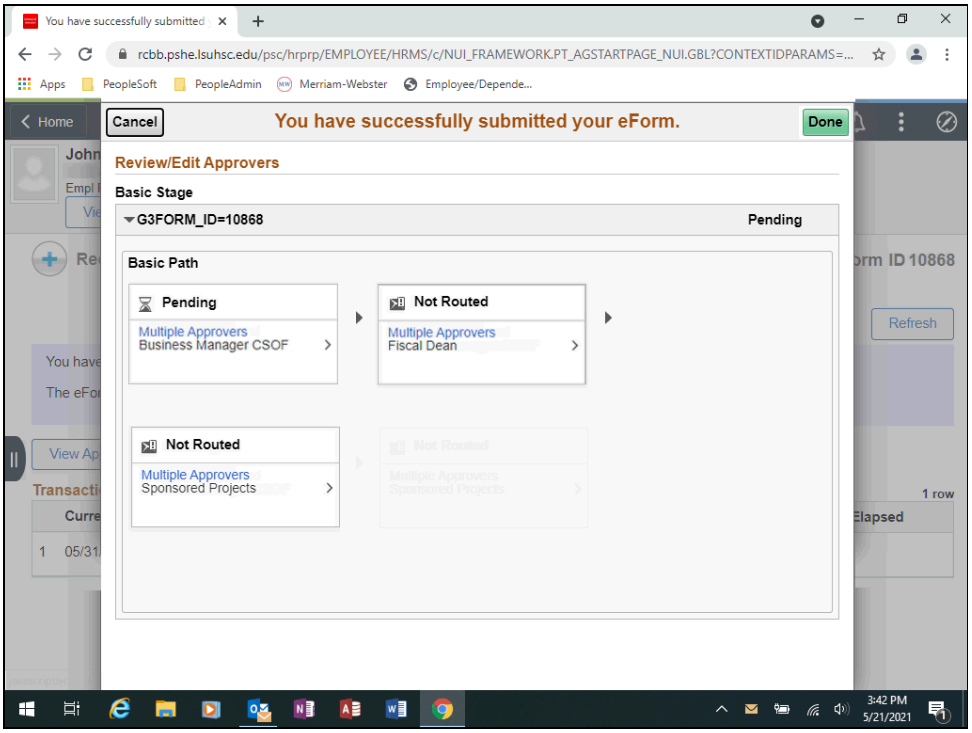
Basic Path

Pending
Multiple Approvers
Business Manager CSOF

Not Routed
Multiple Approvers
Fiscal Dean

Not Routed
Multiple Approvers
Sponsored Projects

Step	Action
66.	**Submitter is NOT CSOF Business Manager** The Approval Routing for Retroactive Requests that do not contain *Federal* accounts, but do contain *Grant* accounts, is shown here.



You have successfully submitted your eForm.

Review/Edit Approvers

Basic Stage

G3FORM_ID=10868 Pending

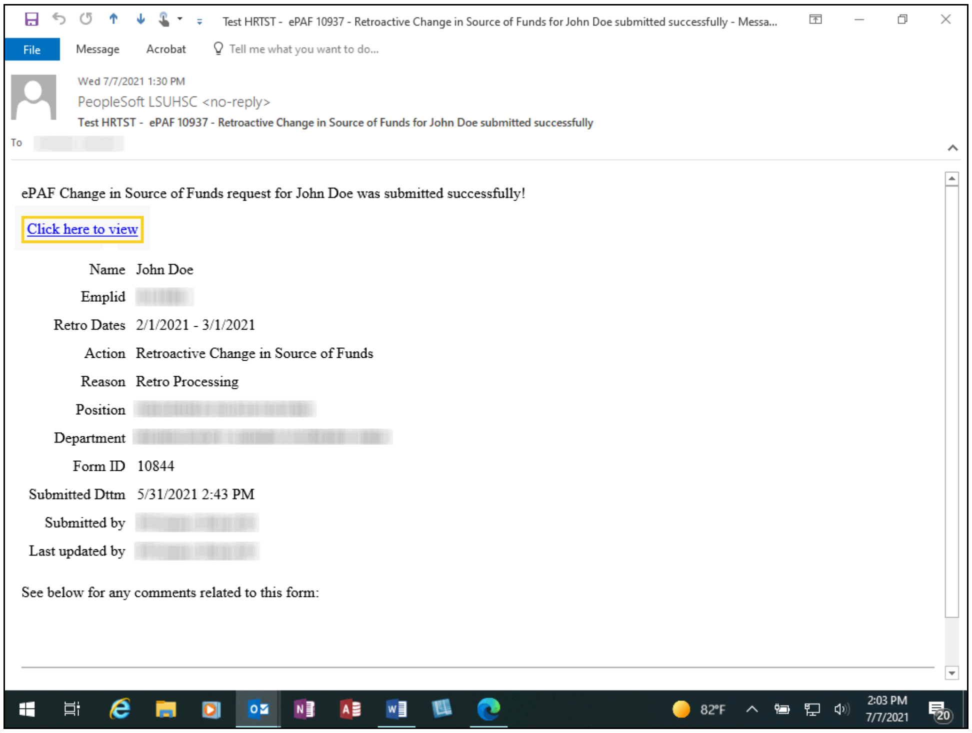
Basic Path

Pending
Multiple Approvers
Business Manager CSOF

Not Routed
Multiple Approvers
Fiscal Dean

Not Routed
Multiple Approvers
Sponsored Projects

Step	Action
67.	**Submitter is NOT CSOF Business Manager** The Approval Routing for Retroactive Requests that contain *Federal* and *Grant* accounts is shown here.


Test HRTST - ePAF 10937 - Retroactive Change in Source of Funds for John Doe submitted successfully - Messa...
File
Message
Acrobat
Tell me what you want to do...
82°F
2:03 PM
7/7/2021
20

Wed 7/7/2021 1:30 PM
PeopleSoft LSUHSC <no-reply>
Test HRTST - ePAF 10937 - Retroactive Change in Source of Funds for John Doe submitted successfully
To [redacted]

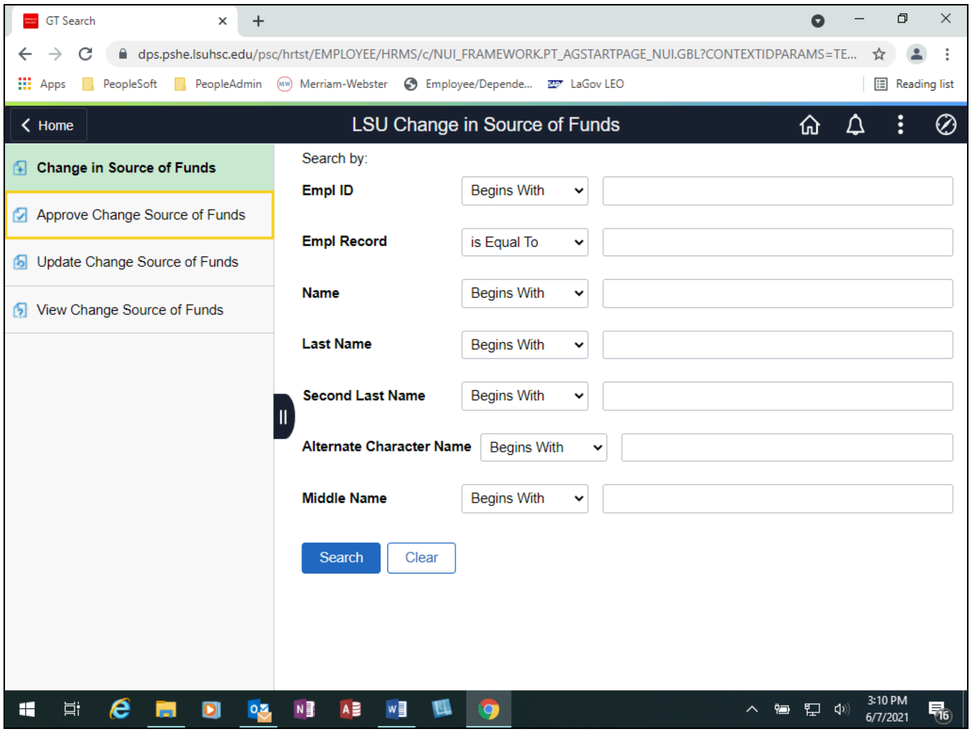
ePAF Change in Source of Funds request for John Doe was submitted successfully!

Click here to view

Name John Doe
Emplid [redacted]
Retro Dates 2/1/2021 - 3/1/2021
Action Retroactive Change in Source of Funds
Reason Retro Processing
Position [redacted]
Department [redacted]
Form ID 10844
Submitted Dttm 5/31/2021 2:43 PM
Submitted by [redacted]
Last updated by [redacted]

See below for any comments related to this form:

Step	Action
68.	**Submitters** will receive the email shown here verifying the CSOF was successfully submitted. Click the **Click here to view** link. Click here to view
69.	The **View Change in Source of Funds: Details** page displays.



GT Search
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
LaGov LEO
Reading list
Home
LSU Change in Source of Funds
Change in Source of Funds
Approve Change Source of Funds
Update Change Source of Funds
View Change Source of Funds
Search
Clear
3:10 PM
6/7/2021

Search by:

Empl ID Begins With

Empl Record is Equal To

Name Begins With

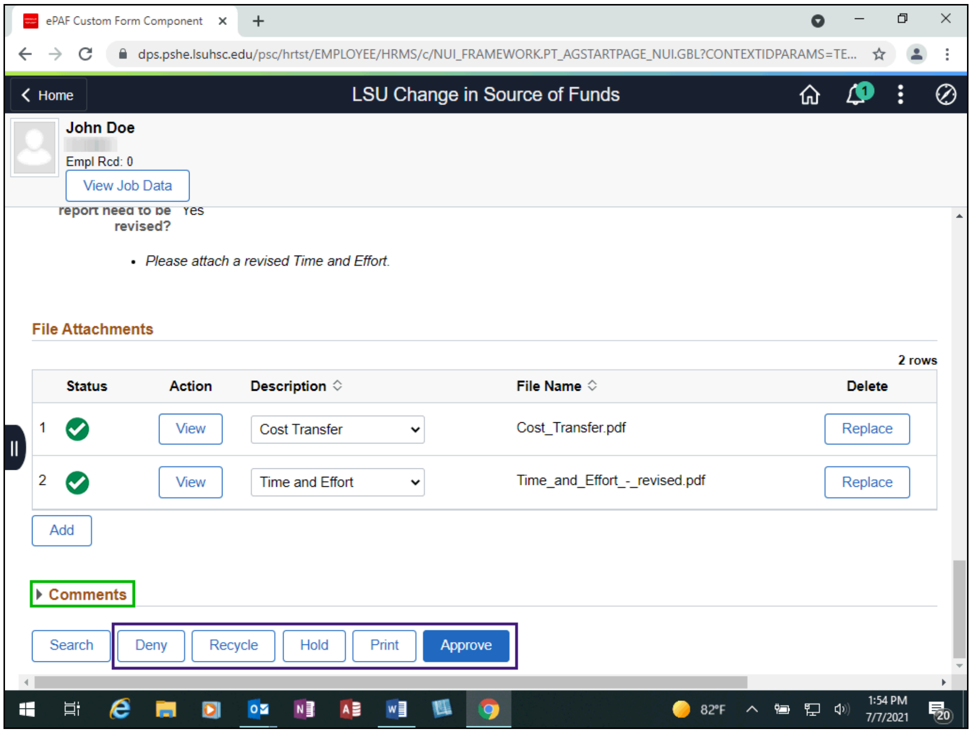
Last Name Begins With

Second Last Name Begins With

Alternate Character Name Begins With

Middle Name Begins With

Step	Action
70.	**Change in Source of Funds Approval Menu Option** Users can also approve the CSOF from the menu options available on the Change in Source of Funds main page. Click the **Approve Change Source of Funds** button. Approve Change Source of Funds
71.	Enter the desired information into the **Empl ID** field. Enter "**0000000**".
72.	Click the **Search** button. Search
73.	The Approve Change in Source of Funds: Details page displays. Click the **Down** scrollbar. ▾


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TE...
Home
LSU Change in Source of Funds
View Job Data
Comments
Search
Deny
Recycle
Hold
Print
Approve
82°F
1:54 PM
7/7/2021

John Doe
Empl Rcd: 0

report need to be revised? Yes

- Please attach a revised Time and Effort.

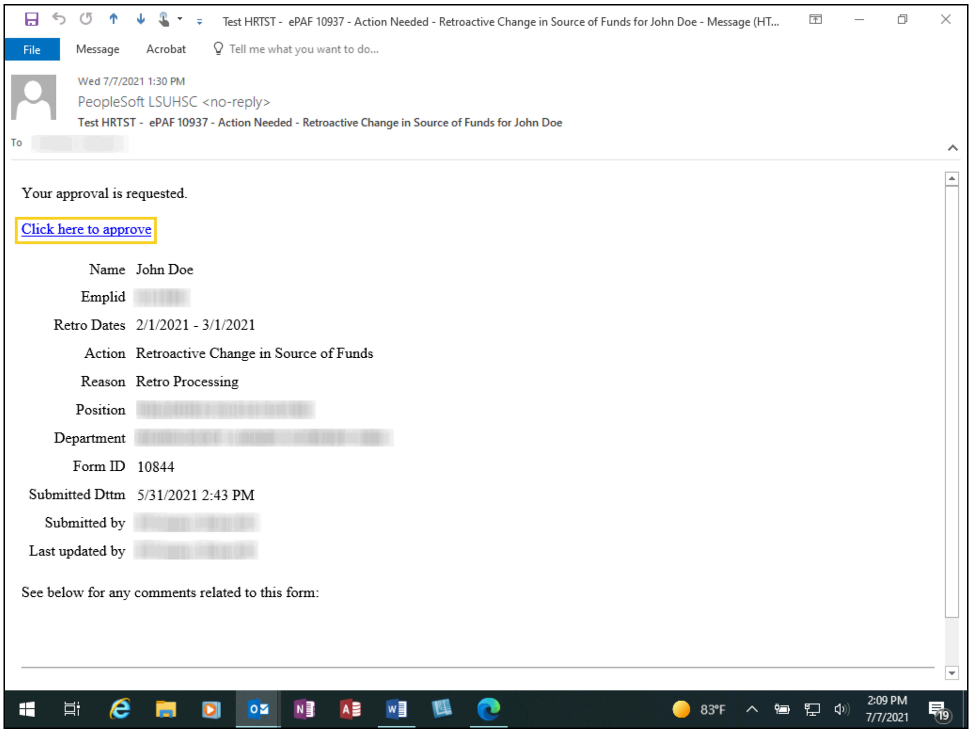
File Attachments

2 rows

	Status	Action	Description	File Name	Delete
1	✓	View	Cost Transfer	Cost_Transfer.pdf	Replace
2	✓	View	Time and Effort	Time_and_Effort_-_revised.pdf	Replace

Add

Step	Action
74.	**Personnel Action Buttons** **Comments** - Sponsored Projects can enter any messages they would like to send to back to the department **Approve** - If all criteria are met, use to approve the PER and automatically send it to the next approver. **Hold** - Use to close the PER and keep it in the worklist until approved, denied or recycled. **Recycle** - Select Recycle if the department is missing a Time and Effort report, or if a question(s) does not appear to be reasonable or completed. The Recycle button will send a comment to the initiator and Recycle the retro back to the department to allow them to correct errors or attach missing documents. **Deny** - Use to reject the PER and permanently end its processing.
75.	Users would select the appropriate option from among *Approve*, *Hold*, *Recycle* and *Delete*. ***Comments should be added if the PER is Held, Recycled, or Denied.***



Test HRTST - ePAF 10937 - Action Needed - Retroactive Change in Source of Funds for John Doe - Message (HT...
File
Message
Acrobat
Tell me what you want to do...
83°F
2:09 PM
7/7/2021

Wed 7/7/2021 1:30 PM
PeopleSoft LSUHSC <no-reply>
Test HRTST - ePAF 10937 - Action Needed - Retroactive Change in Source of Funds for John Doe
To [redacted]

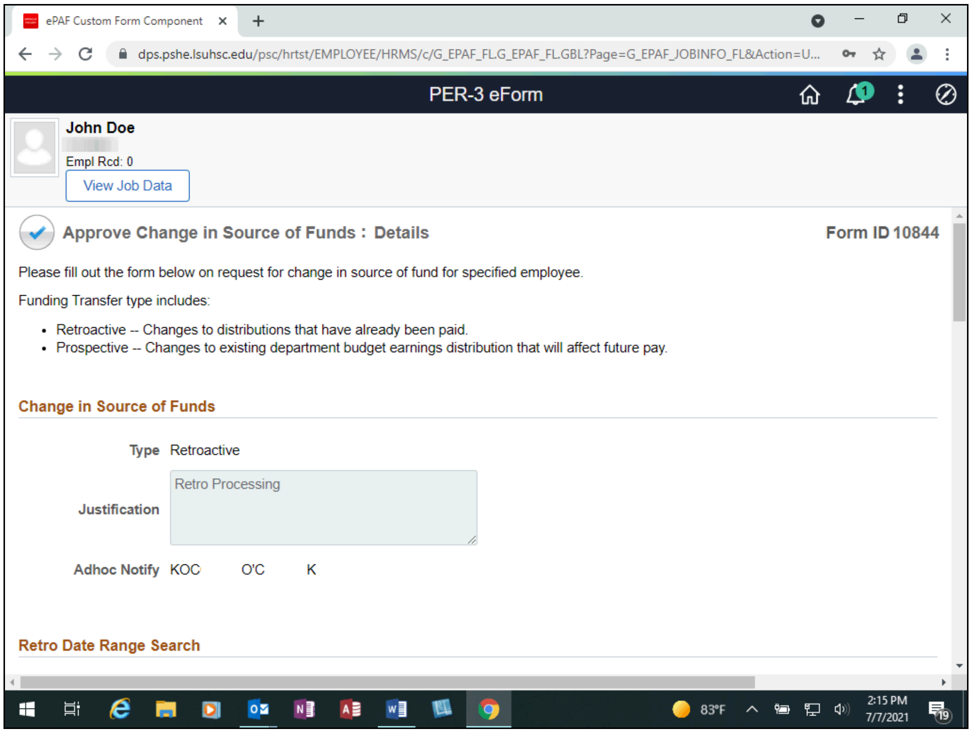
Your approval is requested.

Click here to approve

Name	John Doe
Emplid	[redacted]
Retro Dates	2/1/2021 - 3/1/2021
Action	Retroactive Change in Source of Funds
Reason	Retro Processing
Position	[redacted]
Department	[redacted]
Form ID	10844
Submitted Dttm	5/31/2021 2:43 PM
Submitted by	[redacted]
Last updated by	[redacted]

See below for any comments related to this form:

Step	Action
76.	**Email Approval** The **Approver** will also receive an email stating his/her approval is requested. The **Approver** will select the "**Click here to approve**" link to access the PER. Click the **Click here to approve** link. Click here to approve


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/G_EPAF_FL.G_EPAF_FL.GBL?Page=G_EPAF_JOBINFO_FL&Action=U...
PER-3 eForm
View Job Data
83°F
2:15 PM
7/7/2021

John Doe
[redacted]
Empl Rcd: 0

Approve Change in Source of Funds : Details **Form ID 10844**

Please fill out the form below on request for change in source of fund for specified employee.

Funding Transfer type includes:

- Retroactive -- Changes to distributions that have already been paid.
- Prospective -- Changes to existing department budget earnings distribution that will affect future pay.

Change in Source of Funds

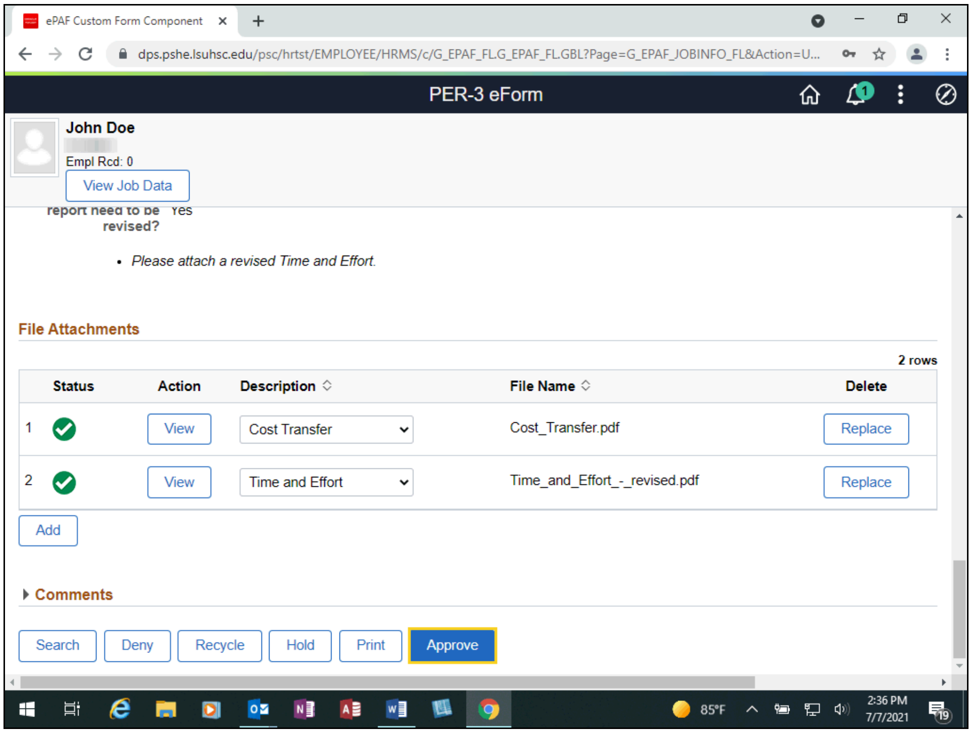
Type Retroactive

Justification Retro Processing

Adhoc Notify KOC O'C K

Retro Date Range Search

Step	Action
77.	The **Approve Change in Source of Funds: Details** page displays. Approvers should review the PER for correctness and completeness. Click the **Down** scrollbar. ▼
78.	**Personnel Action Buttons** **Comments** - Sponsored Projects can enter any messages they would like to send to back to the department **Approve** - If all criteria are met, use to approve the PER and automatically send it to the next approver. **Hold** - Use to close the PER and keep it in the worklist until approved, denied or recycled. **Recycle** - Select Recycle if the department is missing a Time and Effort report, or if a question(s) does not appear to be reasonable or completed. The Recycle button will send a comment to the initiator and Recycle the retro back to the department to allow them to correct errors or attach missing documents. **Deny** - Use to reject the PER and permanently end its processing.


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/G_EPAF_FL.G_EPAF_FL.GBL?Page=G_EPAF_JOBINFO_FL&Action=U...
PER-3 eForm

John Doe
Empl Rcd: 0
View Job Data

report need to be revised? Yes

- *Please attach a revised Time and Effort.*

File Attachments

2 rows

	Status	Action	Description	File Name	Delete
1	✓	View	Cost Transfer	Cost_Transfer.pdf	Replace
2	✓	View	Time and Effort	Time_and_Effort_-_revised.pdf	Replace

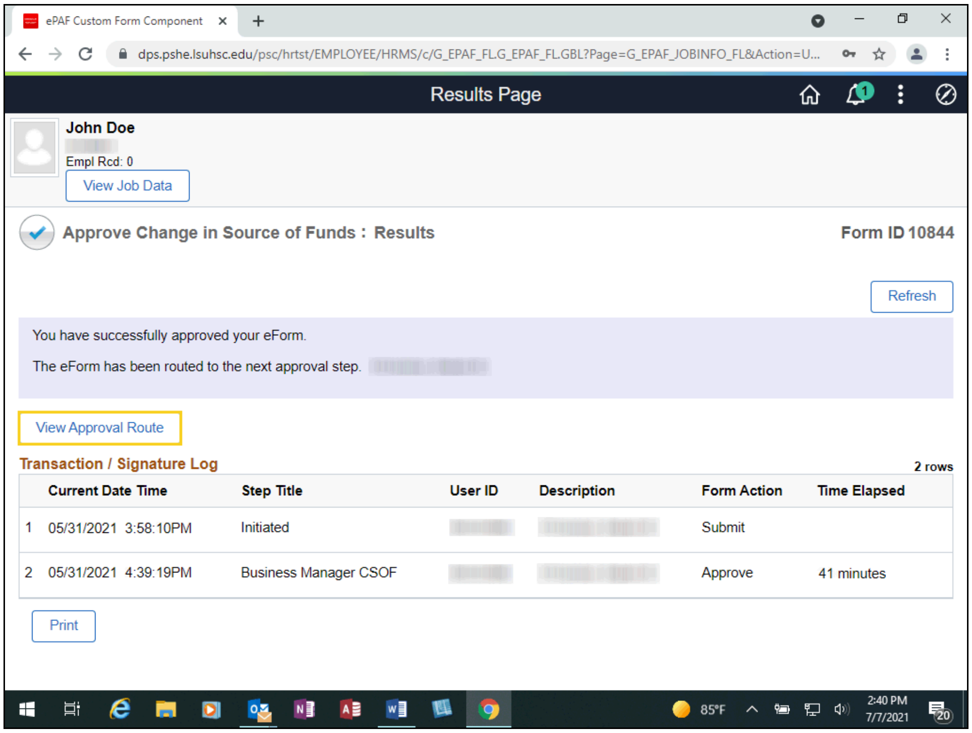
Add

Comments

Search Deny Recycle Hold Print Approve

85°F
2:36 PM
7/7/2021

Step	Action
79.	***Comments should be added if the PER is Held, Recycled, or Denied.*** Click the **Approve** button. Approve


ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/G_EPAF_FLG_EPAF_FL.GBL?Page=G_EPAF_JOBINFO_FL&Action=U...
Results Page
85°F
2:40 PM
7/7/2021

John Doe
[redacted]
Empl Rcd: 0
View Job Data

Approve Change in Source of Funds : Results — Form ID 10844

Refresh

You have successfully approved your eForm.

The eForm has been routed to the next approval step. [redacted]

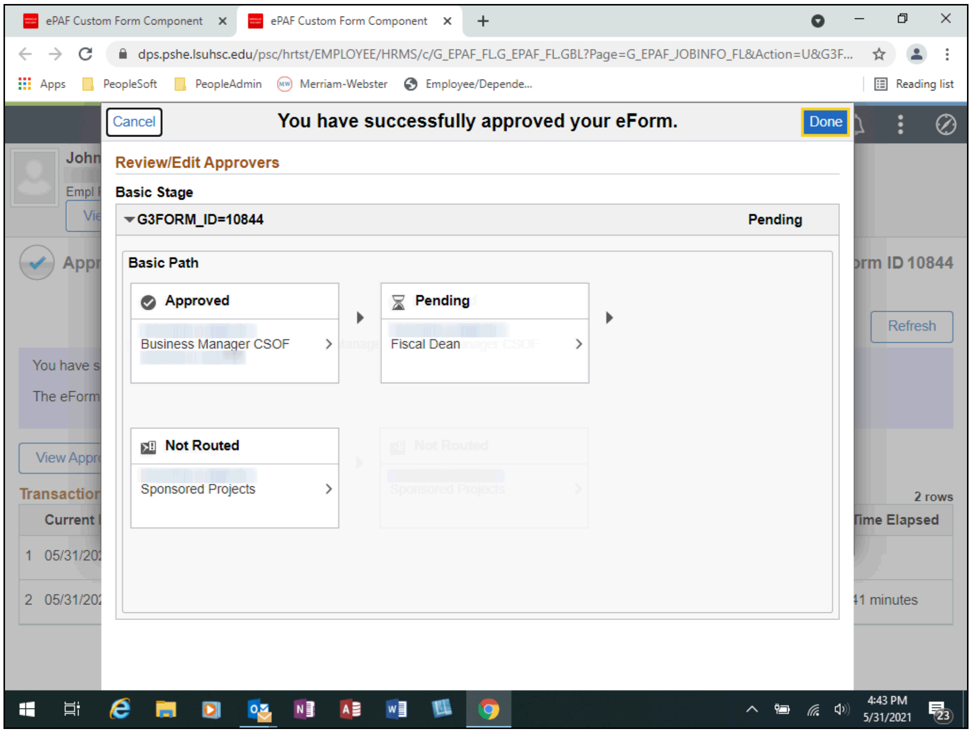
View Approval Route

Transaction / Signature Log — 2 rows

	Current Date Time	Step Title	User ID	Description	Form Action	Time Elapsed
1	05/31/2021 3:58:10PM	Initiated	[redacted]	[redacted]	Submit	
2	05/31/2021 4:39:19PM	Business Manager CSOF	[redacted]	[redacted]	Approve	41 minutes

Print

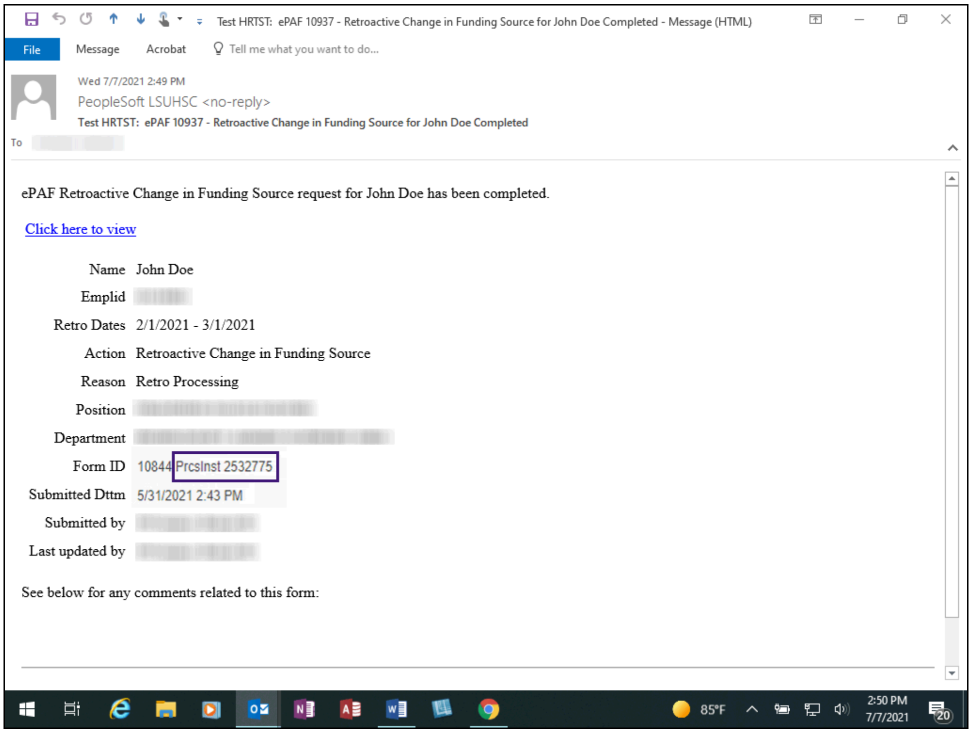
Step	Action
80.	The **Approve Change in Source of Funds: Results** page displays. The transaction path also displays at the bottom of the page. Click the **View Approval Route** button. View Approval Route



You have successfully approved your eForm.

Cancel
Done
Review/Edit Approvers
Basic Stage
G3FORM_ID=10844
Pending
Basic Path
Approved
Business Manager CSOF
Pending
Fiscal Dean
Not Routed
Sponsored Projects
Refresh
2 rows
Time Elapsed

Step	Action
81.	Click the **Done** button. Done



Test HRTST: ePAF 10937 - Retroactive Change in Funding Source for John Doe Completed - Message (HTML)

Wed 7/7/2021 2:49 PM
PeopleSoft LSUHSC <no-reply>
Test HRTST: ePAF 10937 - Retroactive Change in Funding Source for John Doe Completed
To [redacted]

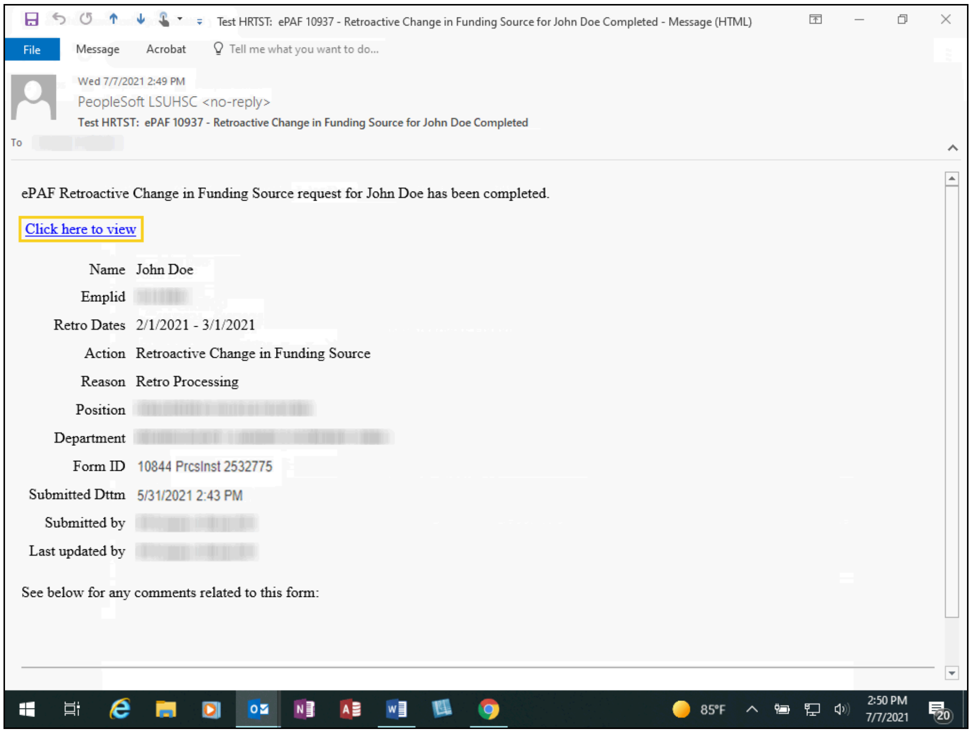
ePAF Retroactive Change in Funding Source request for John Doe has been completed.

Click here to view

Name	John Doe
Emplid	[redacted]
Retro Dates	2/1/2021 - 3/1/2021
Action	Retroactive Change in Funding Source
Reason	Retro Processing
Position	[redacted]
Department	[redacted]
Form ID	10844 PrcsInst 2532775
Submitted Dttm	5/31/2021 2:43 PM
Submitted by	[redacted]
Last updated by	[redacted]

See below for any comments related to this form:

Step	Action
82.	**Process Instance** A *Process Instance* has been added next to the Form ID. The Fiscal Deans and Sponsored Projects *approvals* trigger the post-processing job that posts the Retro request to the ledger. This retro job will run through all the normal retro process from Initial Calc to Final Calc.


Test HRTST: ePAF 10937 - Retroactive Change in Funding Source for John Doe Completed - Message (HTML)
File
Message
Acrobat
Tell me what you want to do...
85°F
2:50 PM
7/7/2021
20

Wed 7/7/2021 2:49 PM
PeopleSoft LSUHSC <no-reply>
Test HRTST: ePAF 10937 - Retroactive Change in Funding Source for John Doe Completed
To [redacted]

ePAF Retroactive Change in Funding Source request for John Doe has been completed.

Click here to view

Name John Doe
Emplid [redacted]
Retro Dates 2/1/2021 - 3/1/2021
Action Retroactive Change in Funding Source
Reason Retro Processing
Position [redacted]
Department [redacted]
Form ID 10844 PrcsInst 2532775
Submitted Dttm 5/31/2021 2:43 PM
Submitted by [redacted]
Last updated by [redacted]

See below for any comments related to this form:

Step	Action
83.	**Notification on Final Approvals** The following participants will be notified once all approvals have been completed for a request: 1) Original Submitter 2) Principal Investigator (if available) 3) Business Manager 4) Delegated Manager (if part of approver group) 5) Sponsored Projects (if part of approver group) 6) Resident Manager (if employee is a Resident) Click the **Click here to view** link. Click here to view
84.	The **View Change in Source of Funds: Details** page displays.
85.	This completes ***Enter Retroactive Change in Source of Funds***. **End of Procedure.**

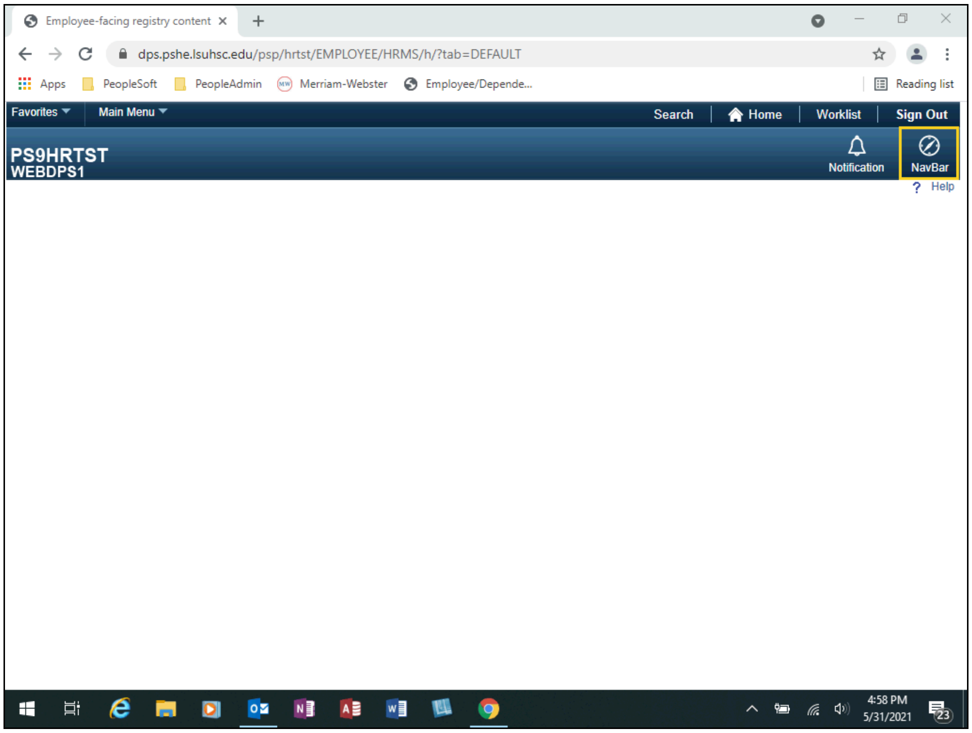
Reporting

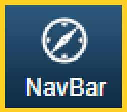
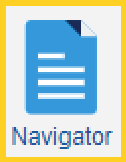
Run Queries (Manager)

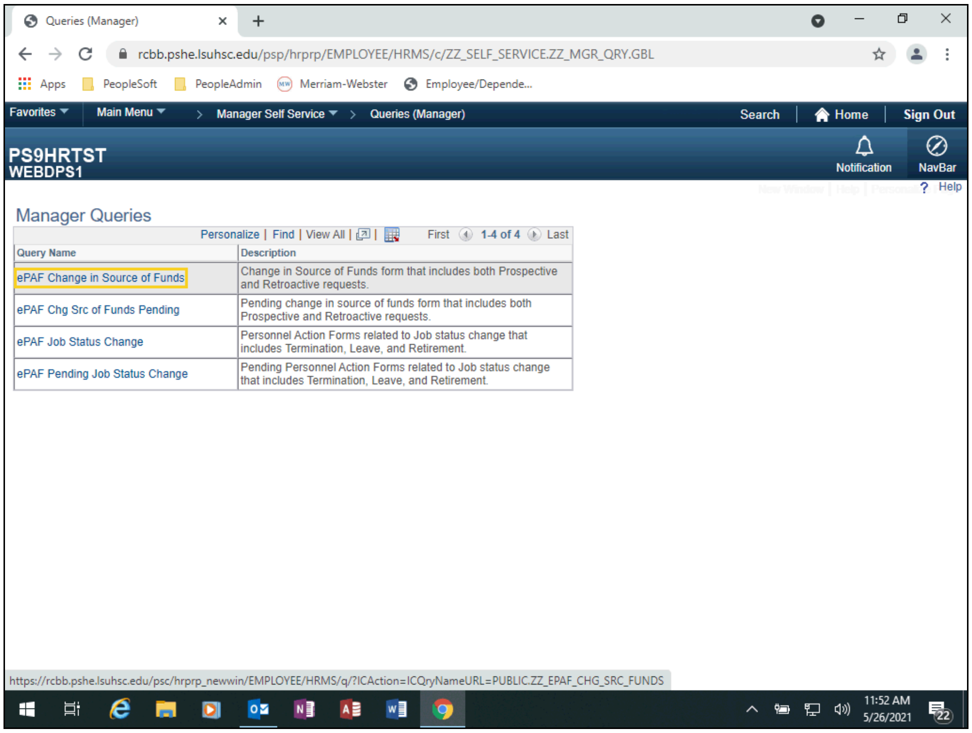
Procedure

In this topic you will learn how to **Run Queries (Manager)**.

Step	Action
1.	There are two queries that can be run using Manager Self-Service to inquire on CSOF status. Statuses can be viewed for CSOF for both Prospective and Retroactive forms. The queries are: • ePAF Change in Source of Funds • ePAF Chg Src of Funds Pending Both will be demonstrated in this exercise.


Employee-facing registry content
dps.pshe.lsuhsc.edu/psp/hrtst/EMPLOYEE/HRMS/h/?tab=DEFAULT
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Favorites
Main Menu
Search
Home
Worklist
Sign Out
PS9HRTST
WEBDPS1
Notification
NavBar
Help
4:58 PM
5/31/2021

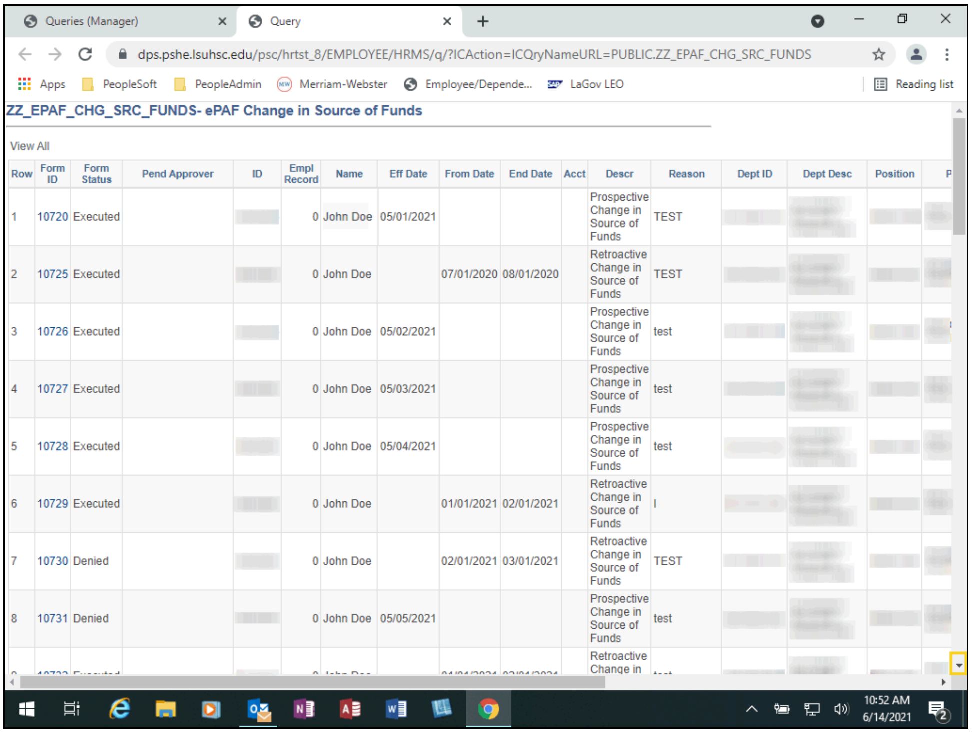
Step	Action
2.	Click the **NavBar** button. 
3.	Click the **Navigator** button. 
4.	Click the **Manager Self Service** menu. Manager Self Service
5.	Click the **Queries (Manager)** menu. Queries (Manager)


Queries (Manager)
rcbb.pshe.lsuhsc.edu/psp/hrprp/EMPLOYEE/HRMS/c/ZZ_SELF_SERVICE.ZZ_MGR_QRY.GBL
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Favorites
Main Menu
Manager Self Service
Queries (Manager)
Search
Home
Sign Out
PS9HRTST
WEBDPS1
Notification
NavBar
Help
Personalize | Find | View All |
First
1-4 of 4
Last
https://rcbb.pshe.lsuhsc.edu/psc/hrprp_newwin/EMPLOYEE/HRMS/q/?ICAction=ICQryNameURL=PUBLIC.ZZ_EPAF_CHG_SRC_FUNDS
11:52 AM
5/26/2021

Manager Queries

Query Name	Description
ePAF Change in Source of Funds	Change in Source of Funds form that includes both Prospective and Retroactive requests.
ePAF Chg Src of Funds Pending	Pending change in source of funds form that includes both Prospective and Retroactive requests.
ePAF Job Status Change	Personnel Action Forms related to Job status change that includes Termination, Leave, and Retirement.
ePAF Pending Job Status Change	Pending Personnel Action Forms related to Job status change that includes Termination, Leave, and Retirement.

Step	Action
6.	The **ePAF Change in Source of Funds** query allows users to view the status of all Prospective and Retroactive requests, regardless of their disposition. Click in the **ePAF Change in Source of Funds** field. ePAF Change in Source of Funds



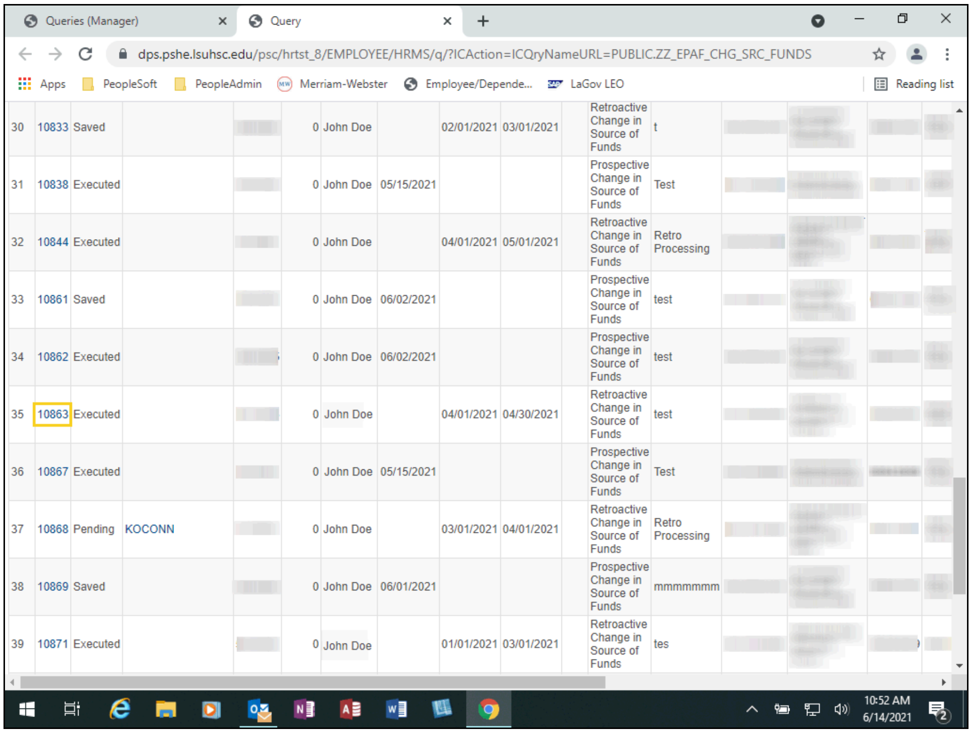
Queries (Manager)
Query
dps.pshe.lsuhsc.edu/psc/hrtst_8/EMPLOYEE/HRMS/q/?ICAction=ICQryNameURL=PUBLIC.ZZ_EPAF_CHG_SRC_FUNDS
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
LaGov LEO
Reading list
10:52 AM
6/14/2021

ZZ_EPAF_CHG_SRC_FUNDS- ePAF Change in Source of Funds

View All

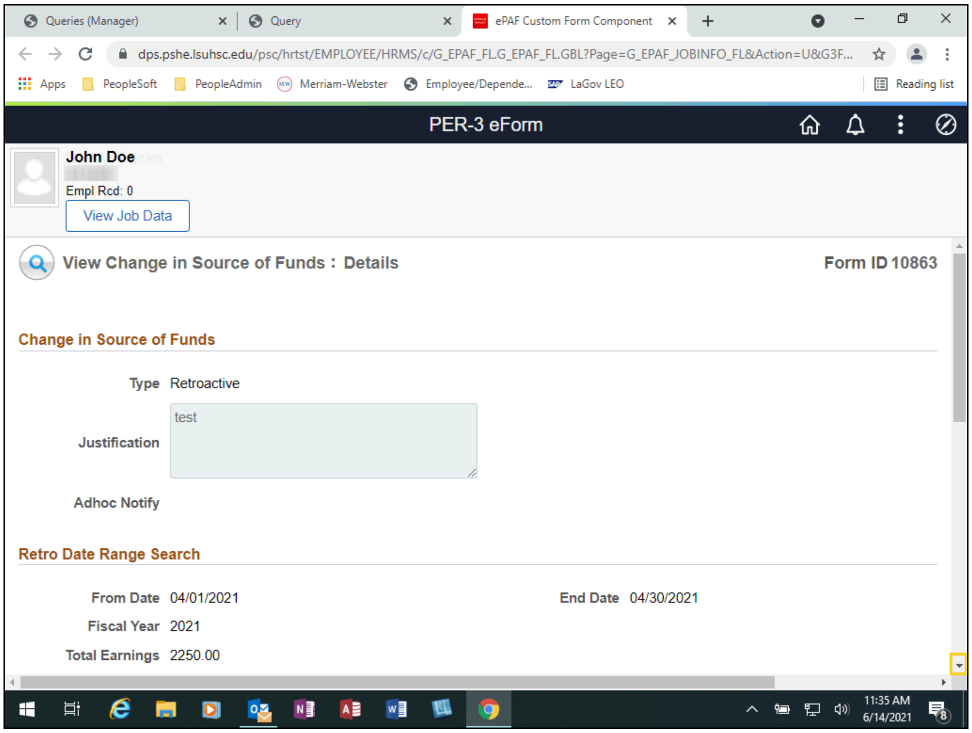
Row	Form ID	Form Status	Pend Approver	ID	Empl Record	Name	Eff Date	From Date	End Date	Acct	Descr	Reason	Dept ID	Dept Desc	Position
1	10720	Executed		[redacted]	0	John Doe	05/01/2021				Prospective Change in Source of Funds	TEST	[redacted]	[redacted]	[redacted]
2	10725	Executed		[redacted]	0	John Doe		07/01/2020	08/01/2020		Retroactive Change in Source of Funds	TEST	[redacted]	[redacted]	[redacted]
3	10726	Executed		[redacted]	0	John Doe	05/02/2021				Prospective Change in Source of Funds	test	[redacted]	[redacted]	[redacted]
4	10727	Executed		[redacted]	0	John Doe	05/03/2021				Prospective Change in Source of Funds	test	[redacted]	[redacted]	[redacted]
5	10728	Executed		[redacted]	0	John Doe	05/04/2021				Prospective Change in Source of Funds	test	[redacted]	[redacted]	[redacted]
6	10729	Executed		[redacted]	0	John Doe		01/01/2021	02/01/2021		Retroactive Change in Source of Funds	I	[redacted]	[redacted]	[redacted]
7	10730	Denied		[redacted]	0	John Doe		02/01/2021	03/01/2021		Retroactive Change in Source of Funds	TEST	[redacted]	[redacted]	[redacted]
8	10731	Denied		[redacted]	0	John Doe	05/05/2021				Prospective Change in Source of Funds	test	[redacted]	[redacted]	[redacted]
											Retroactive Change in				

Step	Action
7.	The list of Change in Source of Funds requests displays. ***NOTE: Click on the Form ID to view form information and Approval routes. Locate Form ID 10863*** Click the **Down** scrollbar. ▾


Queries (Manager)
Query
dps.pshe.lsuhsc.edu/psc/hrtst_8/EMPLOYEE/HRMS/q/?ICAction=ICQryNameURL=PUBLIC.ZZ_EPAF_CHG_SRC_FUNDS
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
LaGov LEO
Reading list
10:52 AM
6/14/2021

30	10833	Saved		[redacted]	0	John Doe		02/01/2021	03/01/2021	Retroactive Change in Source of Funds	t	[redacted]	[redacted]	[redacted]	[redacted]
31	10838	Executed		[redacted]	0	John Doe	05/15/2021			Prospective Change in Source of Funds	Test	[redacted]	[redacted]	[redacted]	[redacted]
32	10844	Executed		[redacted]	0	John Doe		04/01/2021	05/01/2021	Retroactive Change in Source of Funds	Retro Processing	[redacted]	[redacted]	[redacted]	[redacted]
33	10861	Saved		[redacted]	0	John Doe	06/02/2021			Prospective Change in Source of Funds	test	[redacted]	[redacted]	[redacted]	[redacted]
34	10862	Executed		[redacted]	0	John Doe	06/02/2021			Prospective Change in Source of Funds	test	[redacted]	[redacted]	[redacted]	[redacted]
35	10863	Executed		[redacted]	0	John Doe		04/01/2021	04/30/2021	Retroactive Change in Source of Funds	test	[redacted]	[redacted]	[redacted]	[redacted]
36	10867	Executed		[redacted]	0	John Doe	05/15/2021			Prospective Change in Source of Funds	Test	[redacted]	[redacted]	[redacted]	[redacted]
37	10868	Pending	KOCONN	[redacted]	0	John Doe		03/01/2021	04/01/2021	Retroactive Change in Source of Funds	Retro Processing	[redacted]	[redacted]	[redacted]	[redacted]
38	10869	Saved		[redacted]	0	John Doe	06/01/2021			Prospective Change in Source of Funds	mmmmmmm	[redacted]	[redacted]	[redacted]	[redacted]
39	10871	Executed		[redacted]	0	John Doe		01/01/2021	03/01/2021	Retroactive Change in Source of Funds	tes	[redacted]	[redacted]	[redacted]	[redacted]

Step	Action
8.	Click the **Form ID - 10863** button. 10863


Queries (Manager)
Query
ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/G_EPAF_FL.G_EPAF_FL.GBL?Page=G_EPAF_JOBINFO_FL&Action=U&G3F...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
LaGov LEO
Reading list
PER-3 eForm
View Job Data
11:35 AM
6/14/2021

John Doe
[redacted]
Empl Rcd: 0

View Change in Source of Funds : Details

Form ID 10863

Change in Source of Funds

Type Retroactive

Justification test

Adhoc Notify

Retro Date Range Search

From Date 04/01/2021

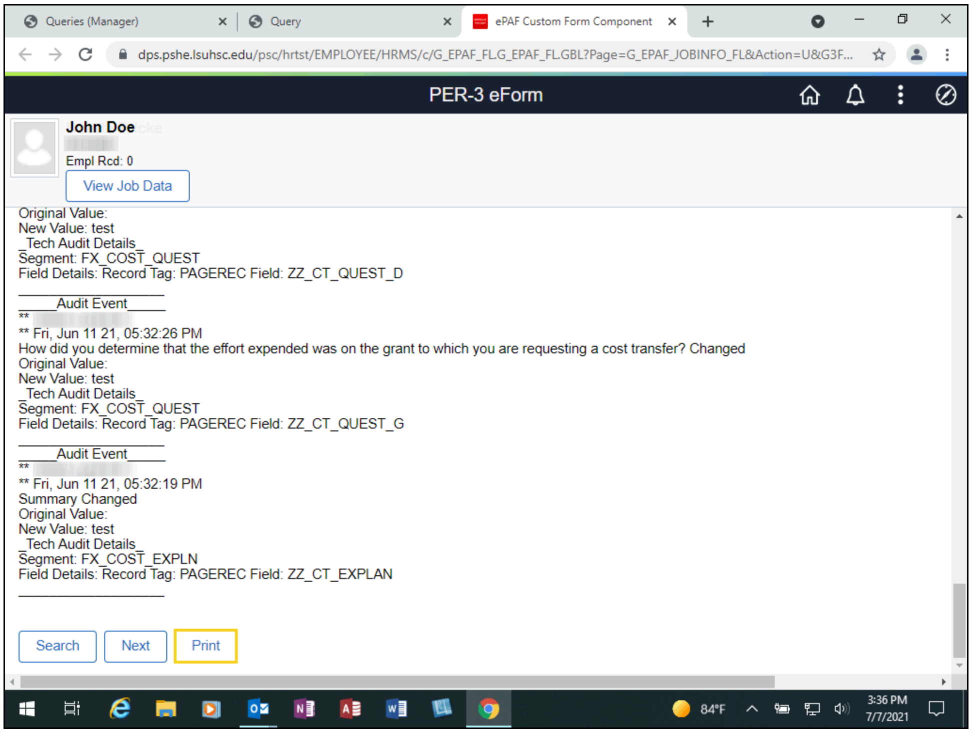
End Date 04/30/2021

Fiscal Year 2021

Total Earnings 2250.00

Step	Action
9.	The *View Change in Source of Funds: Details* page displays. Click the **Down** scrollbar. ▾
10.	*File Attachments* must be printed separate from the CSOF Form. Click in the **View** field. View
11.	Click the **Printer** button. 🖶
12.	Users will select their print parameters and then click the **Print** button. For ***training purposes only***, click in the **Cancel** button. Cancel
13.	Click the **Close** button. ✕

Step	Action
14.	Click the **Down** scrollbar. ▾


Queries (Manager)
Query
ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/G_EPAF_FLG_EPAF_FL.GBL?Page=G_EPAF_JOBINFO_FL&Action=U&G3F...
PER-3 eForm
View Job Data
Search
Next
Print
84°F
3:36 PM
7/7/2021

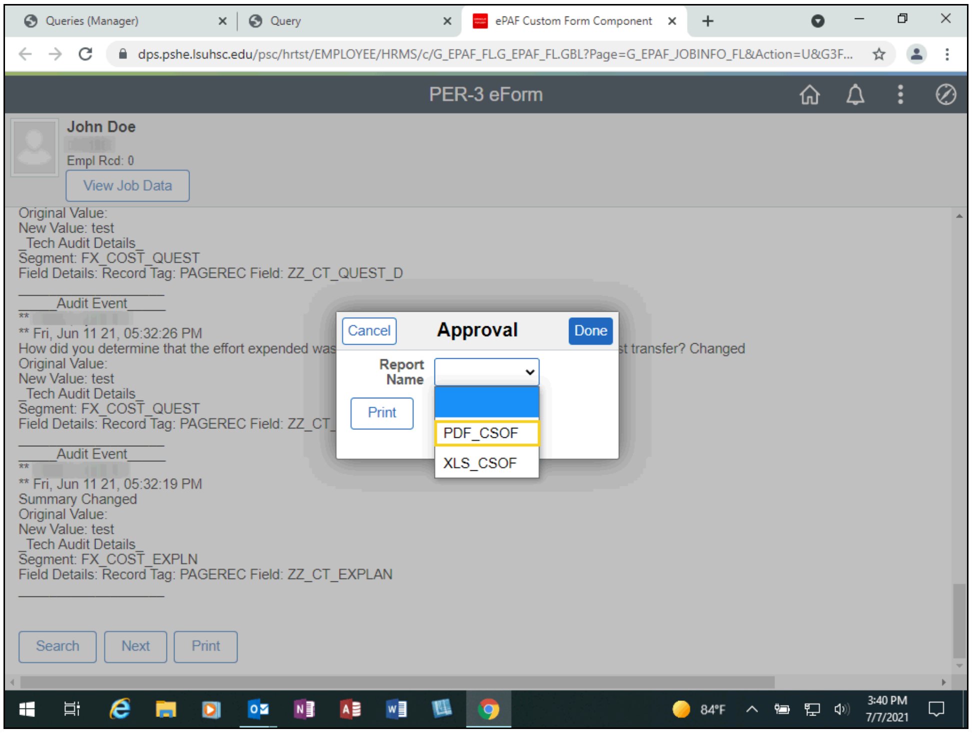
John Doe
[redacted]
Empl Rcd: 0

Original Value:
New Value: test
Tech Audit Details
Segment: FX_COST_QUEST
Field Details: Record Tag: PAGEREC Field: ZZ_CT_QUEST_D

______Audit Event______
** [redacted]
** Fri, Jun 11 21, 05:32:26 PM
How did you determine that the effort expended was on the grant to which you are requesting a cost transfer? Changed
Original Value:
New Value: test
Tech Audit Details
Segment: FX_COST_QUEST
Field Details: Record Tag: PAGEREC Field: ZZ_CT_QUEST_G

______Audit Event______
** [redacted]
** Fri, Jun 11 21, 05:32:19 PM
Summary Changed
Original Value:
New Value: test
Tech Audit Details
Segment: FX_COST_EXPLN
Field Details: Record Tag: PAGEREC Field: ZZ_CT_EXPLAN

Step	Action
15.	Either a **Prospective or Retro e-CSOF** can printed by selecting the **Print** option at the bottom of the page. Click the **Print** button. Print
16.	Click the button to the right of the **Report Name** field. ⌄


Queries (Manager)
Query
ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/G_EPAF_FL.G_EPAF_FL.GBL?Page=G_EPAF_JOBINFO_FL&Action=U&G3F...
PER-3 eForm
View Job Data
Cancel
Approval
Done
Report Name
Print
PDF_CSOF
XLS_CSOF
Search
Next
Print
84°F
3:40 PM
7/7/2021

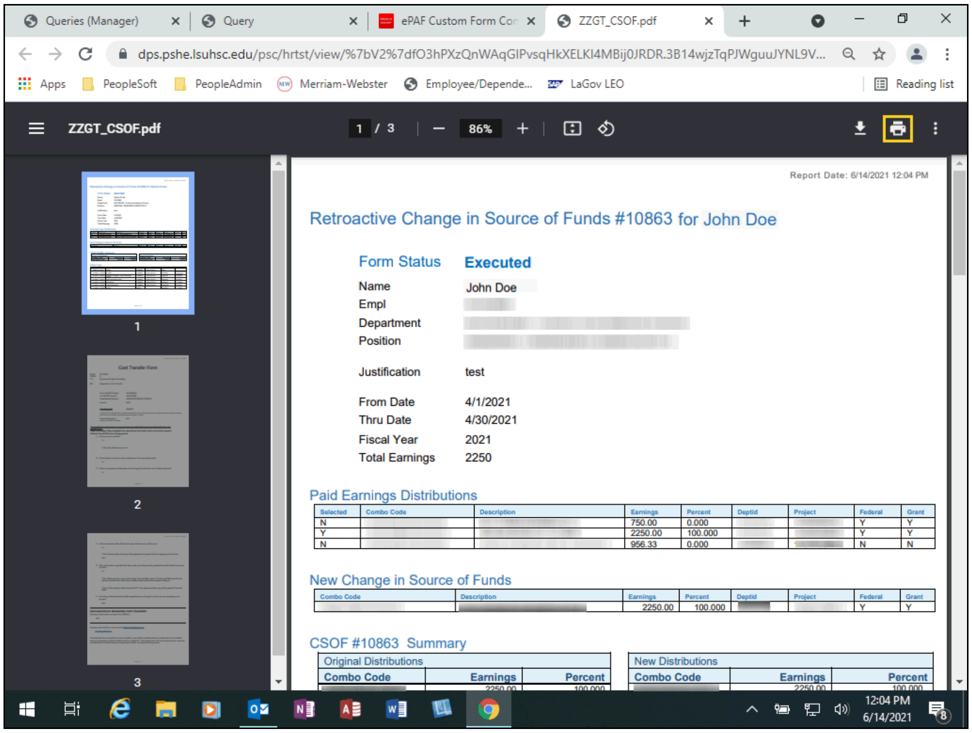
John Doe
[redacted]
Empl Rcd: 0

Original Value:
New Value: test
Tech Audit Details
Segment: FX_COST_QUEST
Field Details: Record Tag: PAGEREC Field: ZZ_CT_QUEST_D

____Audit Event____
** [redacted]
** Fri, Jun 11 21, 05:32:26 PM
How did you determine that the effort expended was … st transfer? Changed
Original Value:
New Value: test
Tech Audit Details
Segment: FX_COST_QUEST
Field Details: Record Tag: PAGEREC Field: ZZ_CT_…

____Audit Event____
** [redacted]
** Fri, Jun 11 21, 05:32:19 PM
Summary Changed
Original Value:
New Value: test
Tech Audit Details
Segment: FX_COST_EXPLN
Field Details: Record Tag: PAGEREC Field: ZZ_CT_EXPLAN

Step	Action
17.	Two printing options are available. By selecting PDF or XLS, users will print a *summary* report of the *e-CSOF* for either a **Prospective** or **Retro** request. Click the **PDF_CSOF** list item. PDF_CSOF
18.	Click the **Print** button. Print


Queries (Manager)
Query
ePAF Custom Form Con
ZZGT_CSOF.pdf
dps.pshe.lsuhsc.edu/psc/hrtst/view/%7bV2%7dfO3hPXzQnWAqGlPvsqHkXELKI4MBij0JRDR.3B14wjzTqPJWguuJYNL9V...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
LaGov LEO
Reading list
ZZGT_CSOF.pdf
1 / 3
86%
1
2
3
12:04 PM
6/14/2021

Report Date: 6/14/2021 12:04 PM

Retroactive Change in Source of Funds #10863 for John Doe

Form Status	**Executed**
Name	John Doe
Empl	[redacted]
Department	[redacted]
Position	[redacted]
Justification	test
From Date	4/1/2021
Thru Date	4/30/2021
Fiscal Year	2021
Total Earnings	2250

Paid Earnings Distributions

Selected	Combo Code	Description	Earnings	Percent	Deptid	Project	Federal	Grant
N	[redacted]	[redacted]	750.00	0.000	[redacted]	[redacted]	Y	Y
Y	[redacted]	[redacted]	2250.00	100.000	[redacted]	[redacted]	Y	Y
N	[redacted]	[redacted]	956.33	0.000	[redacted]	[redacted]	N	N

New Change in Source of Funds

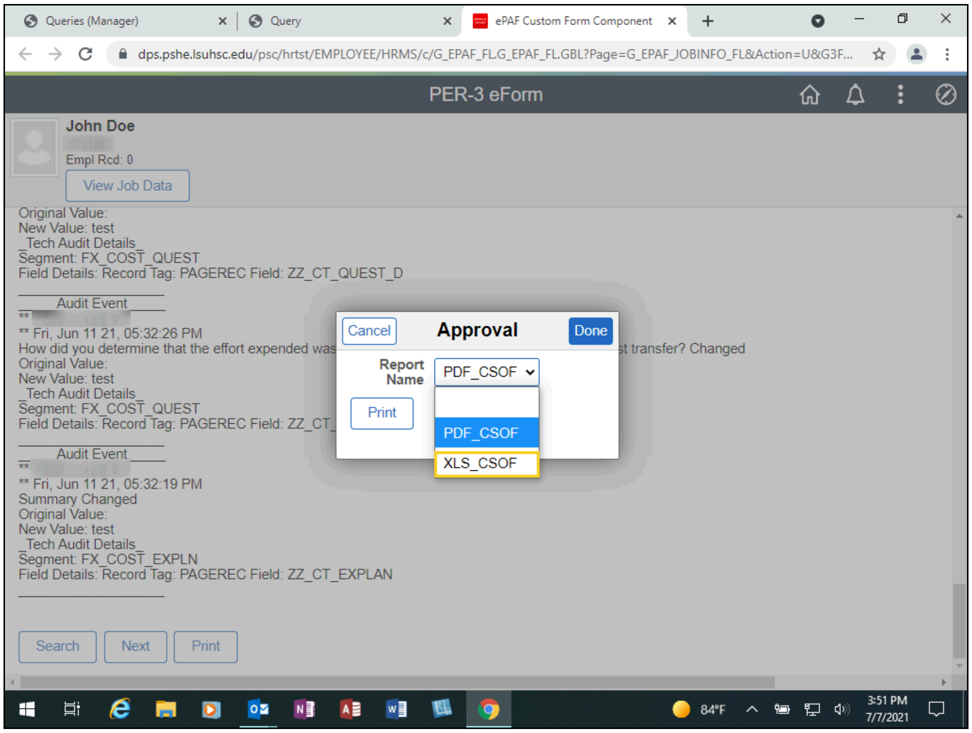
Combo Code	Description	Earnings	Percent	Deptid	Project	Federal	Grant
[redacted]	[redacted]	2250.00	100.000	[redacted]	[redacted]	Y	Y

CSOF #10863 Summary

Original Distributions		
Combo Code	Earnings	Percent

New Distributions		
Combo Code	Earnings	Percent

Step	Action
19.	The Retro Change in Source of Funds for John Doe displays. Click the **Print** button. 🖨
20.	Select your print parameters. For training purposes only, click the **Cancel** button. Cancel
21.	If the request is a **Retro,** users can select the Cost_Transfer_DEMO option to print the Cost Transfer questions and answers. Click the **Close ZZGT_CSOF.pdf** tab. ✕
22.	Click the button to the right of the **Report Name** field. ⌄


Queries (Manager)
Query
ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/G_EPAF_FL.G_EPAF_FL.GBL?Page=G_EPAF_JOBINFO_FL&Action=U&G3F...
PER-3 eForm
View Job Data
Cancel
Approval
Done
Print
Search
Next
Print
84°F
3:51 PM
7/7/2021

John Doe
[redacted]
Empl Rcd: 0

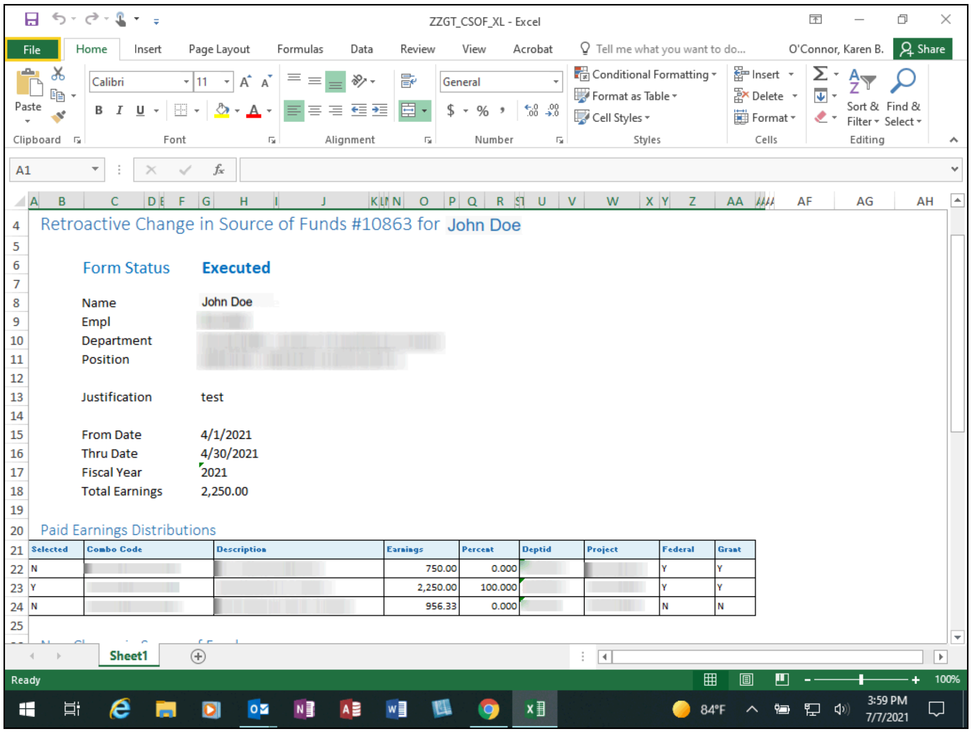
Original Value:
New Value: test
Tech Audit Details
Segment: FX_COST_QUEST
Field Details: Record Tag: PAGEREC Field: ZZ_CT_QUEST_D

_____Audit Event_____
** [redacted]
** Fri, Jun 11 21, 05:32:26 PM
How did you determine that the effort expended was ... t transfer? Changed
Original Value:
New Value: test
Tech Audit Details
Segment: FX_COST_QUEST
Field Details: Record Tag: PAGEREC Field: ZZ_CT_

_____Audit Event_____
** [redacted]
** Fri, Jun 11 21, 05:32:19 PM
Summary Changed
Original Value:
New Value: test
Tech Audit Details
Segment: FX_COST_EXPLN
Field Details: Record Tag: PAGEREC Field: ZZ_CT_EXPLAN

Report Name: PDF_CSOF
PDF_CSOF
XLS_CSOF

Step	Action
23.	Users can also have their print display in Excel format by selecting the XLS_CSOF option. Click the **XLS_CSOF** list item.
24.	Click in the **Print** field.


ZZGT_CSOF_XL - Excel
File
Home
Insert
Page Layout
Formulas
Data
Review
View
Acrobat
Tell me what you want to do...
O'Connor, Karen B.
Share
Clipboard
Font
Alignment
Number
Styles
Cells
Editing
Conditional Formatting
Format as Table
Cell Styles
Insert
Delete
Format
Sort & Filter
Find & Select
Sheet1
Ready
100%
84°F
3:59 PM
7/7/2021

Retroactive Change in Source of Funds #10863 for John Doe

Form Status: Executed

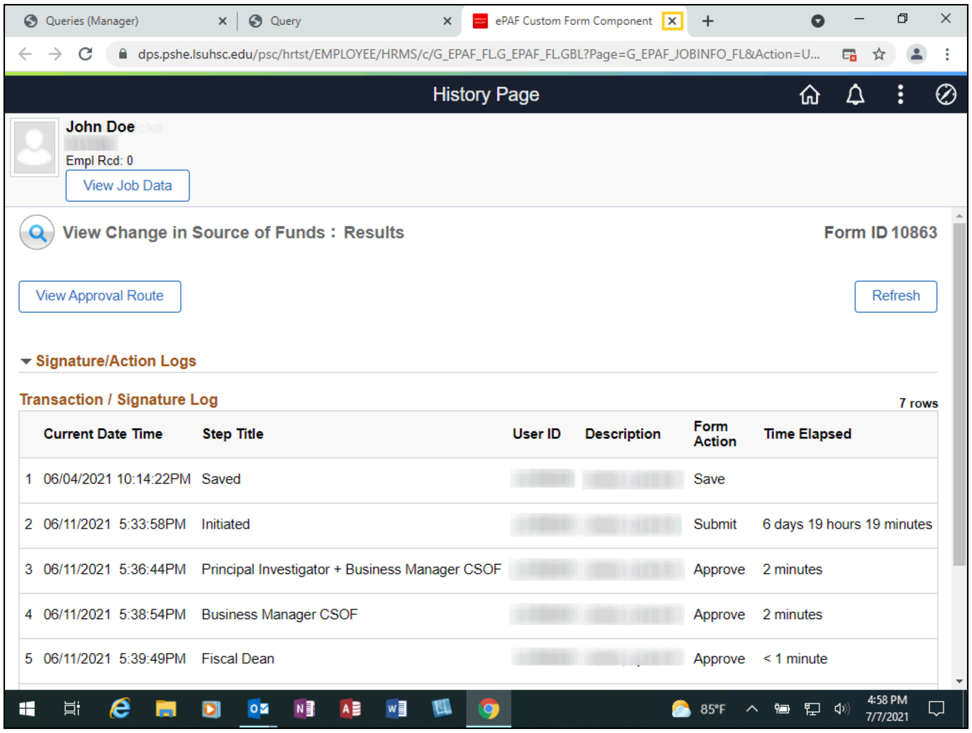
Name	John Doe
Empl	[redacted]
Department	[redacted]
Position	[redacted]
Justification	test
From Date	4/1/2021
Thru Date	4/30/2021
Fiscal Year	2021
Total Earnings	2,250.00

Paid Earnings Distributions

Selected	Combo Code	Description	Earnings	Percent	Deptid	Project	Federal	Grant
N	[redacted]	[redacted]	750.00	0.000	[redacted]	[redacted]	Y	Y
Y	[redacted]	[redacted]	2,250.00	100.000	[redacted]	[redacted]	Y	Y
N	[redacted]	[redacted]	956.33	0.000	[redacted]	[redacted]	N	N

Step	Action
25.	The Retro CSOF displays. Click the **File** tab.
26.	Click the **File Tab** button. File
27.	Click the **Print** menu. Print
28.	For training purposes only, click the **Close** button. ☒
29.	Click the **Done** button. Done
30.	Click the **Next** button. Next

Step	Action
31.	The View Change in Source of Funds: Results page displays. Users can click the ***View Approval Route*** to determine what approvals have been received, if any. If the page is blank, all approvals have been received.
32.	This CSOF has been *Executed*, so all Approvals have been received. Click the **Signature/Action Logs** button. ▸ Signature/Action Logs


Queries (Manager)
Query
ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/G_EPAF_FLG_EPAF_FL.GBL?Page=G_EPAF_JOBINFO_FL&Action=U...
History Page
View Job Data
View Approval Route
Refresh
85°F
4:58 PM
7/7/2021

John Doe
[redacted]
Empl Rcd: 0

View Change in Source of Funds : Results

Form ID 10863

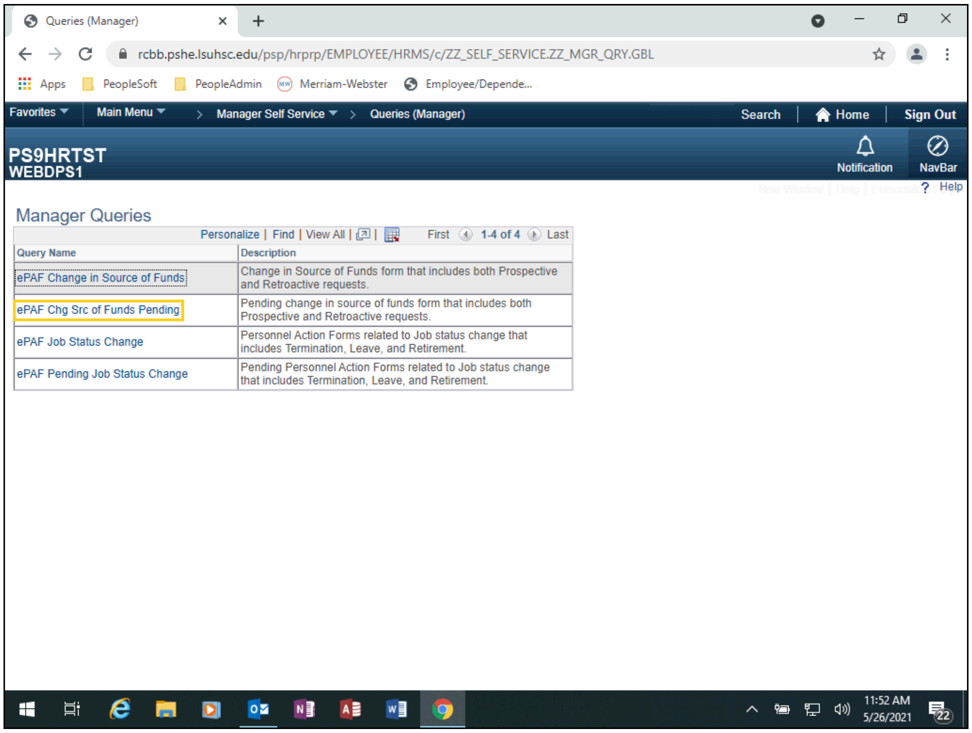
▾ Signature/Action Logs

Transaction / Signature Log

7 rows

	Current Date Time	Step Title	User ID	Description	Form Action	Time Elapsed
1	06/04/2021 10:14:22PM	Saved	[redacted]	[redacted]	Save	
2	06/11/2021 5:33:58PM	Initiated	[redacted]	[redacted]	Submit	6 days 19 hours 19 minutes
3	06/11/2021 5:36:44PM	Principal Investigator + Business Manager CSOF	[redacted]	[redacted]	Approve	2 minutes
4	06/11/2021 5:38:54PM	Business Manager CSOF	[redacted]	[redacted]	Approve	2 minutes
5	06/11/2021 5:39:49PM	Fiscal Dean	[redacted]	[redacted]	Approve	< 1 minute

Step	Action
33.	Click the **Close** tab. ☒
34.	Click the **Close Query** tab. ☒



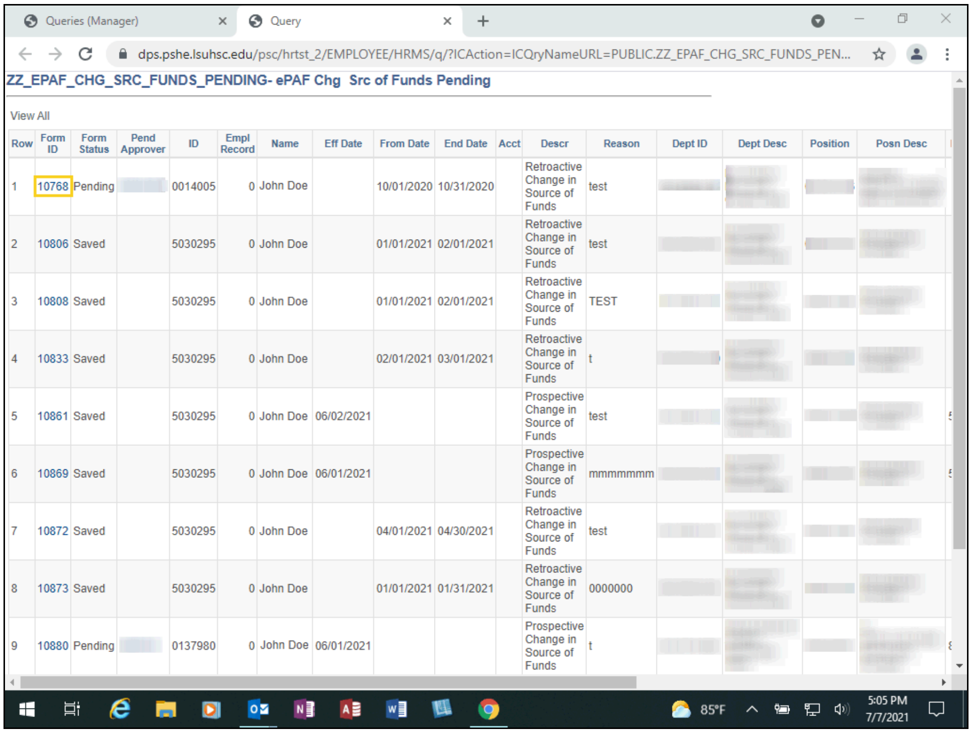
Queries (Manager)
rcbb.pshe.lsuhsc.edu/psp/hrprp/EMPLOYEE/HRMS/c/ZZ_SELF_SERVICE.ZZ_MGR_QRY.GBL
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Favorites
Main Menu
Manager Self Service
Queries (Manager)
Search
Home
Sign Out
PS9HRTST
WEBDPS1
Notification
NavBar
Help
11:52 AM
5/26/2021

Manager Queries

Personalize | Find | View All | First 1-4 of 4 Last

Query Name	Description
ePAF Change in Source of Funds	Change in Source of Funds form that includes both Prospective and Retroactive requests.
ePAF Chg Src of Funds Pending	Pending change in source of funds form that includes both Prospective and Retroactive requests.
ePAF Job Status Change	Personnel Action Forms related to Job status change that includes Termination, Leave, and Retirement.
ePAF Pending Job Status Change	Pending Personnel Action Forms related to Job status change that includes Termination, Leave, and Retirement.

Step	Action
35.	The **ePAF Chg Src of Funds** Pending will display the status of both Prospective and Retroactive requests as well. However, users will only see Pending, Saved or In Error requests. Click in the **ePAF Chg Src of Funds Pending** field. ePAF Chg Src of Funds Pending



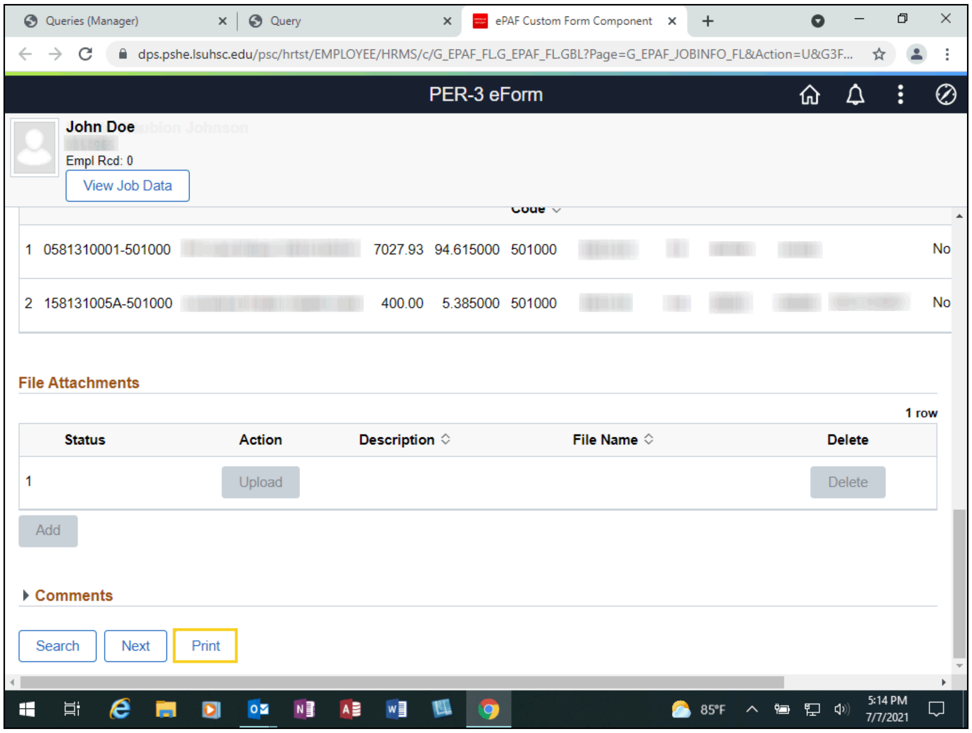
ZZ_EPAF_CHG_SRC_FUNDS_PENDING- ePAF Chg Src of Funds Pending

View All

Row	Form ID	Form Status	Pend Approver	ID	Empl Record	Name	Eff Date	From Date	End Date	Acct	Descr	Reason	Dept ID	Dept Desc	Position	Posn Desc
1	10768	Pending	[redacted]	0014005	0	John Doe		10/01/2020	10/31/2020		Retroactive Change in Source of Funds	test	[redacted]	[redacted]	[redacted]	[redacted]
2	10806	Saved		5030295	0	John Doe		01/01/2021	02/01/2021		Retroactive Change in Source of Funds	test	[redacted]	[redacted]	[redacted]	[redacted]
3	10808	Saved		5030295	0	John Doe		01/01/2021	02/01/2021		Retroactive Change in Source of Funds	TEST	[redacted]	[redacted]	[redacted]	[redacted]
4	10833	Saved		5030295	0	John Doe		02/01/2021	03/01/2021		Retroactive Change in Source of Funds	t	[redacted]	[redacted]	[redacted]	[redacted]
5	10861	Saved		5030295	0	John Doe	06/02/2021				Prospective Change in Source of Funds	test	[redacted]	[redacted]	[redacted]	[redacted]
6	10869	Saved		5030295	0	John Doe	06/01/2021				Prospective Change in Source of Funds	mmmmmmm	[redacted]	[redacted]	[redacted]	[redacted]
7	10872	Saved		5030295	0	John Doe		04/01/2021	04/30/2021		Retroactive Change in Source of Funds	test	[redacted]	[redacted]	[redacted]	[redacted]
8	10873	Saved		5030295	0	John Doe		01/01/2021	01/31/2021		Retroactive Change in Source of Funds	0000000	[redacted]	[redacted]	[redacted]	[redacted]
9	10880	Pending	[redacted]	0137980	0	John Doe	06/01/2021				Prospective Change in Source of Funds	t	[redacted]	[redacted]	[redacted]	[redacted]

Queries (Manager)
Query
dps.pshe.lsuhsc.edu/psc/hrtst_2/EMPLOYEE/HRMS/q/?ICAction=ICQryNameURL=PUBLIC.ZZ_EPAF_CHG_SRC_FUNDS_PEN...
85°F
5:05 PM
7/7/2021

Step	Action
36.	The list of *Pending/Saved Change in Source of Funds* requests display. Click the **Form ID 10868** button. 10768
37.	The View Change in Source of Funds: Details displays. Click the **Down** scrollbar. ▼


Queries (Manager)
Query
ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/G_EPAF_FLG_EPAF_FL.GBL?Page=G_EPAF_JOBINFO_FL&Action=U&G3F...
PER-3 eForm
View Job Data
Upload
Delete
Add
Search
Next
Print
85°F
5:14 PM
7/7/2021

John Doe [redacted]
[redacted]
Empl Rcd: 0

1	0581310001-501000	[redacted]	7027.93	94.615000	501000	[redacted]	No
2	158131005A-501000	[redacted]	400.00	5.385000	501000	[redacted]	No

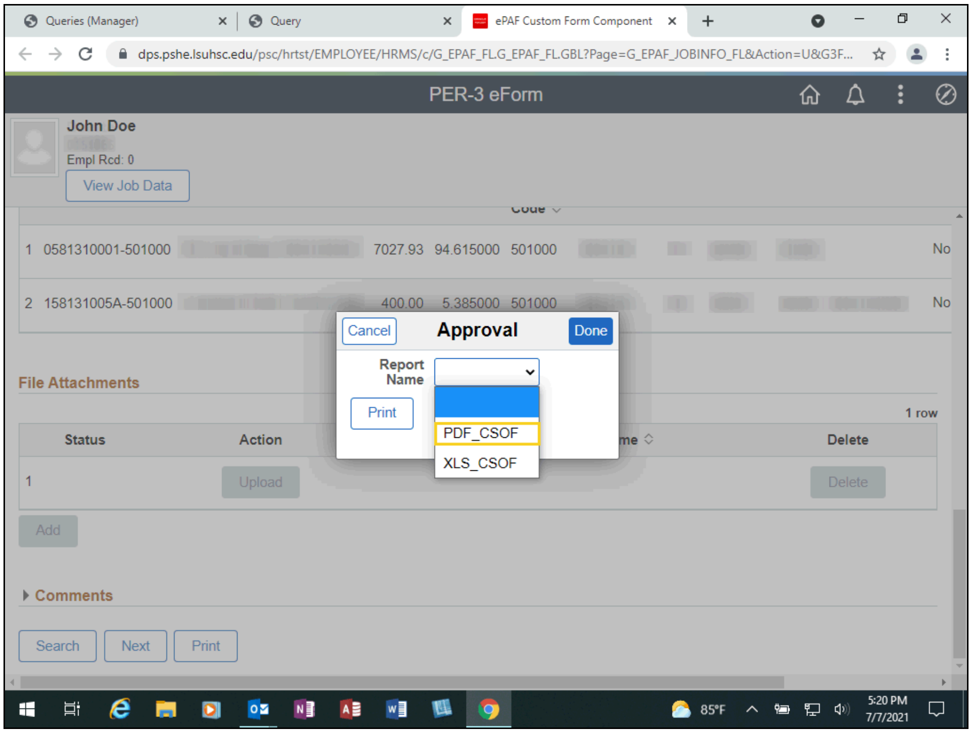
File Attachments

1 row

Status	Action	Description	File Name	Delete
1	Upload			Delete

Comments

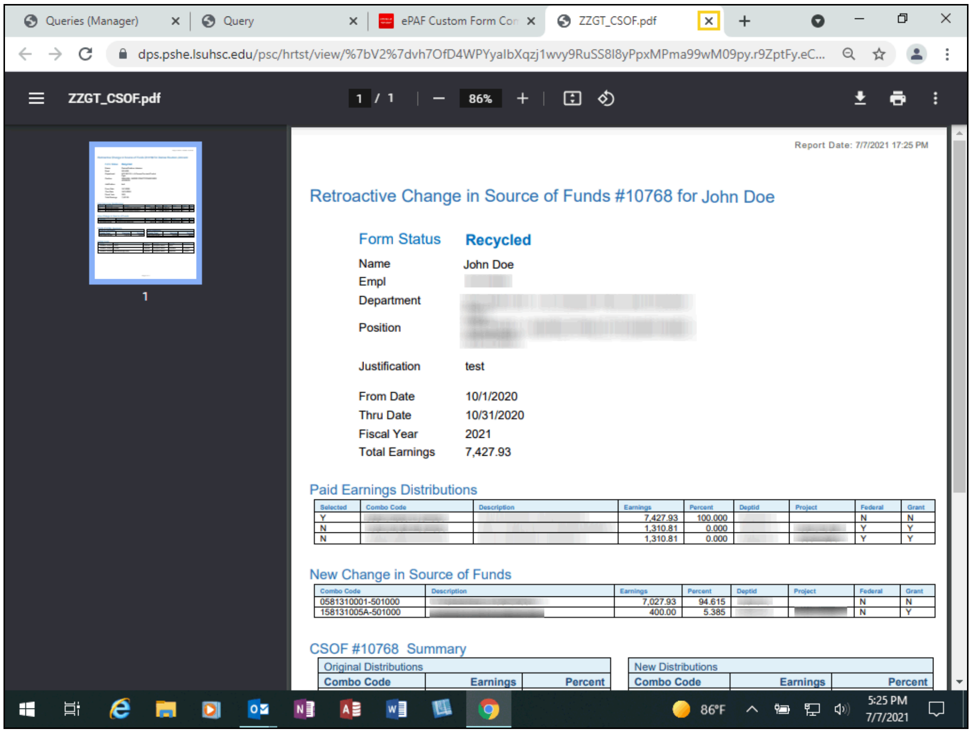
Step	Action
38.	Either a **Prospective or Retro e-CSOF** can printed by selecting the **Print** option at the bottom of the page. Click in the **Print** field. Print
39.	Click the **Report Name** dropdown button to activate the menu. ⌄


Queries (Manager)
Query
ePAF Custom Form Component
dps.pshe.lsuhsc.edu/psc/hrtst/EMPLOYEE/HRMS/c/G_EPAF_FL.G_EPAF_FL.GBL?Page=G_EPAF_JOBINFO_FL&Action=U&G3F...
PER-3 eForm
John Doe
Empl Rcd: 0
View Job Data
Code
File Attachments
1 row
Status
Action
Delete
Upload
Delete
Add
Comments
Search
Next
Print
Cancel
Approval
Done
Report Name
Print
PDF_CSOF
XLS_CSOF
85°F
5:20 PM
7/7/2021

1 0581310001-501000 [redacted] 7027.93 94.615000 501000 [redacted] No

2 158131005A-501000 [redacted] 400.00 5.385000 501000 [redacted] No

Step	Action
40.	Two printing options are available. By selecting PDF or XLS, users will print a *summary* report of the *e-CSOF* for either a **Prospective** or **Retro** request. ***NOTE: If it is a Retro request, the Cost Transfer information will also display for printing.*** Click the **PDF_CSOF** list item. PDF_CSOF
41.	Click the **Print** button. Print


Queries (Manager)
Query
ePAF Custom Form Con
ZZGT_CSOF.pdf
dps.pshe.lsuhsc.edu/psc/hrtst/view/%7bV2%7dvh7OfD4WPYyalbXqzj1wvy9RuSS8I8yPpxMPma99wM09py.r9ZptFy.eC...
ZZGT_CSOF.pdf
1 / 1
86%
86°F
5:25 PM
7/7/2021

Report Date: 7/7/2021 17:25 PM

Retroactive Change in Source of Funds #10768 for John Doe

Form Status	**Recycled**
Name	John Doe
Empl	[redacted]
Department	[redacted]
Position	[redacted]
Justification	test
From Date	10/1/2020
Thru Date	10/31/2020
Fiscal Year	2021
Total Earnings	7,427.93

Paid Earnings Distributions

Selected	Combo Code	Description	Earnings	Percent	Deptid	Project	Federal	Grant
Y	[redacted]	[redacted]	7,427.93	100.000	[redacted]		N	N
N	[redacted]	[redacted]	1,310.81	0.000	[redacted]	[redacted]	Y	Y
N	[redacted]	[redacted]	1,310.81	0.000	[redacted]	[redacted]	Y	Y

New Change in Source of Funds

Combo Code	Description	Earnings	Percent	Deptid	Project	Federal	Grant
0581310001-501000	[redacted]	7,027.93	94.615	[redacted]		N	N
158131005A-501000	[redacted]	400.00	5.385	[redacted]	[redacted]	N	Y

CSOF #10768 Summary

Original Distributions		
Combo Code	Earnings	Percent

New Distributions		
Combo Code	Earnings	Percent

Step	Action
42.	The *Retro Change in Source of Funds* for John Doe displays. ***NOTE: Users can print the report by clicking the Print icon located at the top right corner of the page.*** Click the **Close ZZGT_CSOF.pdf** tab. ☒
43.	Click the **Done** button. Done
44.	Click the **Close ePAF Custom Form Component** tab. ☒
45.	Click the **Close Query** tab. ☒
46.	This completes ***Run Queries (Manager)***. **End of Procedure.**

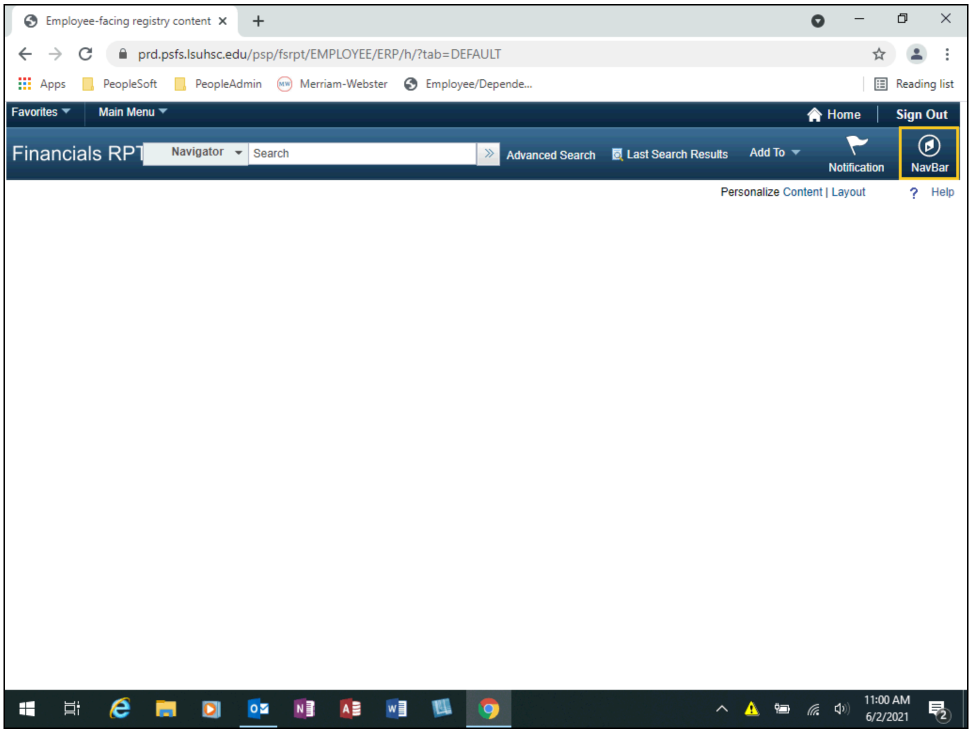
Run BI Publisher HR Journal Details by Date Rng Report in FIN RPT

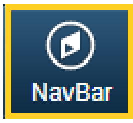
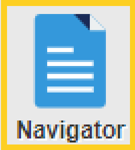
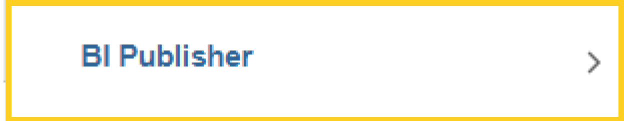
Procedure

In this topic you will learn how to **Run BI Publisher HR Journal Details by Date Rng Report in Fin RPT**.

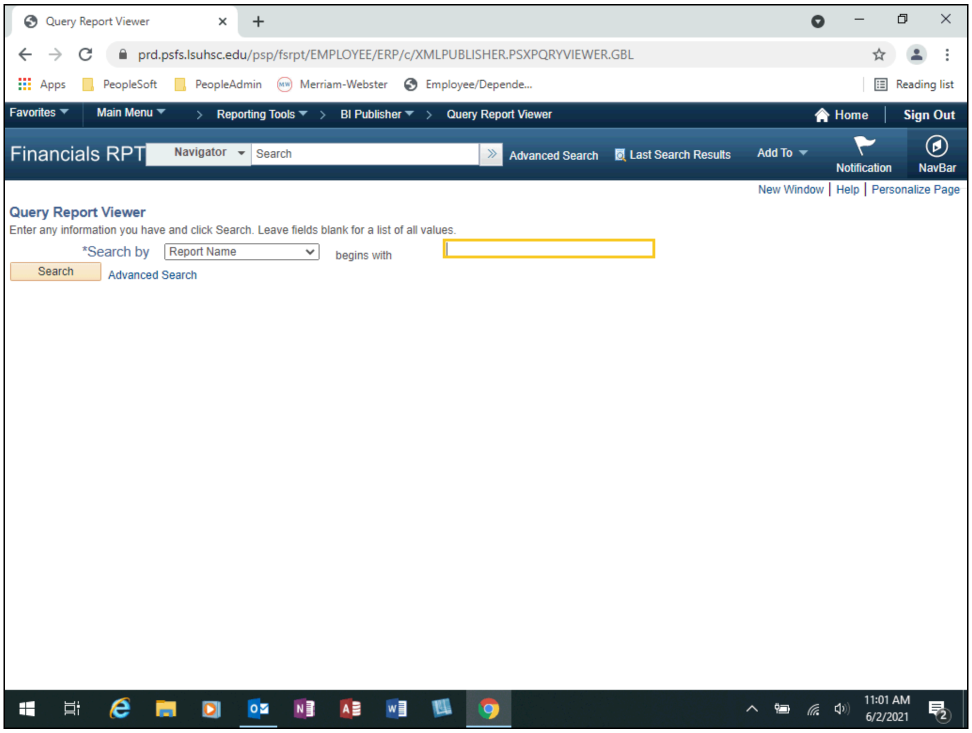
NOTE: The FIN Reports (RPT) database is one day behind Production.

Step	Action
1.	Users can check the FIN Reports (RPT) system to see if their Change in Source of Funds (CSOF) request has been posted to the ledger. Two BI Publisher reports have been written to obtain Journal Details regarding CSOF requests: • **ZZGLX067** – HR Journal Details by Date Rng • **ZZGLX068** – HR Adjustment Jrnl Dtl ***In this exercise, you will run the HR Journal Details by Date Rng Report.***


Employee-facing registry content
prd.psfs.lsuhsc.edu/psp/fsrpt/EMPLOYEE/ERP/h/?tab=DEFAULT
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Favorites
Main Menu
Home
Sign Out
Financials RPT
Navigator
Search
Advanced Search
Last Search Results
Add To
Notification
NavBar
Personalize Content | Layout
Help
11:00 AM
6/2/2021

Step	Action
2.	Click the **NavBar** button. 
3.	Click the **Navigator** menu. 
4.	Click the **Reporting Tools** menu. Reporting Tools
5.	Click the **BI Publisher** menu.  BI Publisher

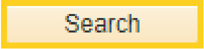
Step	Action
6.	Click the **Query Report Viewer** list item. Query Report Viewer

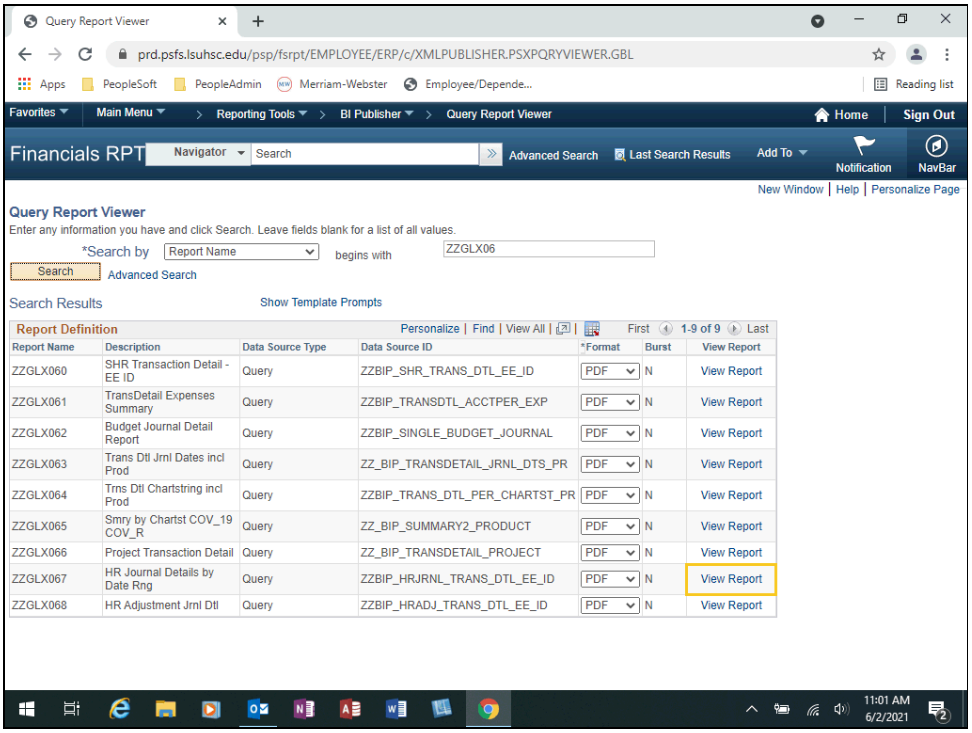

Query Report Viewer
prd.psfs.lsuhsc.edu/psp/fsrpt/EMPLOYEE/ERP/c/XMLPUBLISHER.PSXPQRYVIEWER.GBL
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Favorites
Main Menu
Reporting Tools
BI Publisher
Query Report Viewer
Home
Sign Out
Financials RPT
Navigator
Search
Advanced Search
Last Search Results
Add To
Notification
NavBar
New Window | Help | Personalize Page
Search
Advanced Search
11:01 AM
6/2/2021

Query Report Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search by Report Name begins with

Step	Action
7.	Enter the desired information into the field. Enter "**ZZGLX06**".
8.	Click the **Search** button.  Search


Query Report Viewer
prd.psfs.lsuhsc.edu/psp/fsrpt/EMPLOYEE/ERP/c/XMLPUBLISHER.PSXPQRYVIEWER.GBL
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Favorites
Main Menu
Reporting Tools
BI Publisher
Query Report Viewer
Home
Sign Out
Financials RPT
Navigator
Search
Advanced Search
Last Search Results
Add To
Notification
NavBar
New Window | Help | Personalize Page

Query Report Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search by: Report Name begins with ZZGLX06

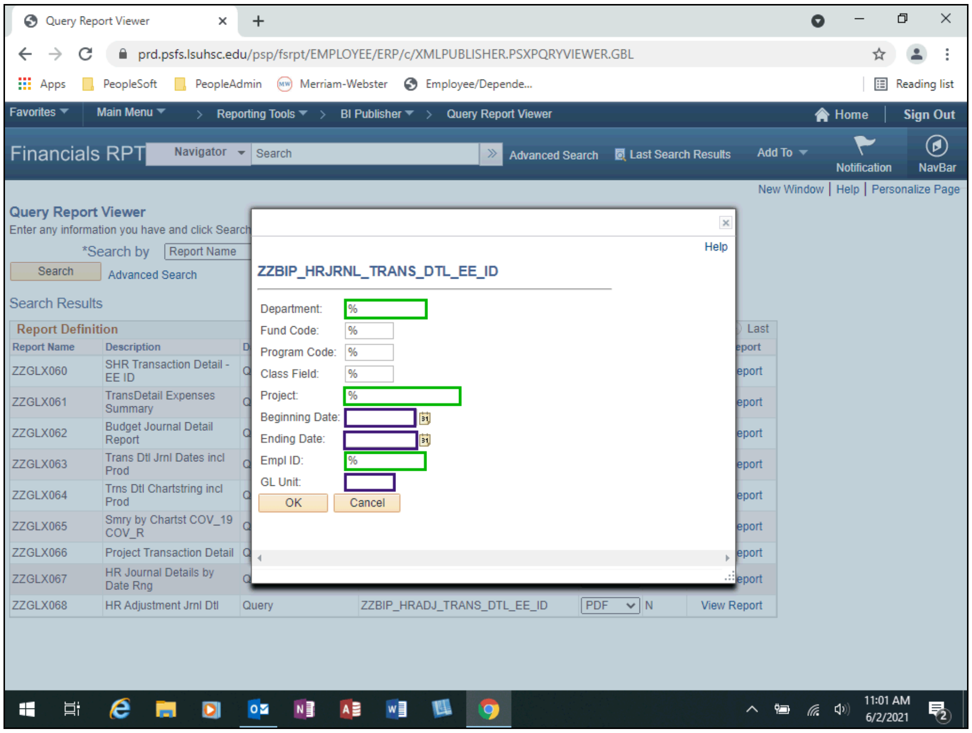
Search
Advanced Search
Search Results
Show Template Prompts
Personalize | Find | View All
First 1-9 of 9 Last

Report Definition

Report Name	Description	Data Source Type	Data Source ID	*Format	Burst	View Report
ZZGLX060	SHR Transaction Detail - EE ID	Query	ZZBIP_SHR_TRANS_DTL_EE_ID	PDF	N	View Report
ZZGLX061	TransDetail Expenses Summary	Query	ZZBIP_TRANSDTL_ACCTPER_EXP	PDF	N	View Report
ZZGLX062	Budget Journal Detail Report	Query	ZZBIP_SINGLE_BUDGET_JOURNAL	PDF	N	View Report
ZZGLX063	Trans Dtl Jrnl Dates incl Prod	Query	ZZ_BIP_TRANSDETAIL_JRNL_DTS_PR	PDF	N	View Report
ZZGLX064	Trns Dtl Chartstring incl Prod	Query	ZZBIP_TRANS_DTL_PER_CHARTST_PR	PDF	N	View Report
ZZGLX065	Smry by Chartst COV_19 COV_R	Query	ZZ_BIP_SUMMARY2_PRODUCT	PDF	N	View Report
ZZGLX066	Project Transaction Detail	Query	ZZ_BIP_TRANSDETAIL_PROJECT	PDF	N	View Report
ZZGLX067	HR Journal Details by Date Rng	Query	ZZBIP_HRJRNL_TRANS_DTL_EE_ID	PDF	N	View Report
ZZGLX068	HR Adjustment Jrnl Dtl	Query	ZZBIP_HRADJ_TRANS_DTL_EE_ID	PDF	N	View Report

11:01 AM
6/2/2021

Step	Action
9.	Select the **ZZGLX067** report. Click the **View Report** link. View Report

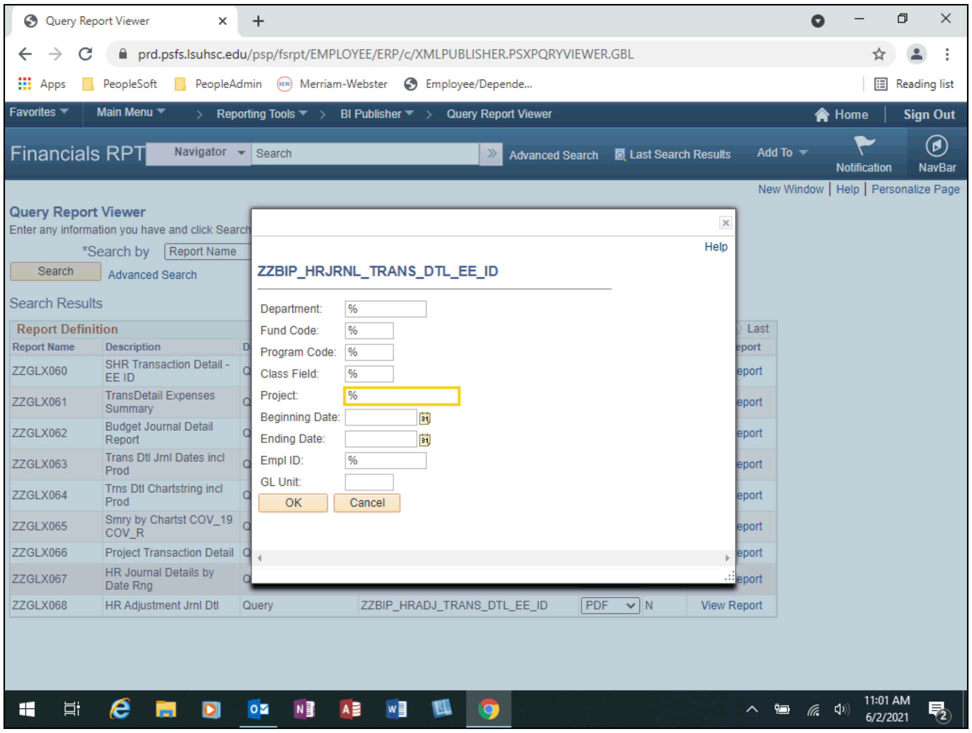


ZZBIP_HRJRNL_TRANS_DTL_EE_ID

Department: %
Fund Code: %
Program Code: %
Class Field: %
Project: %
Beginning Date:
Ending Date:
Empl ID: %
GL Unit:

Query Report Viewer
prd.psfs.lsuhsc.edu/psp/fsrpt/EMPLOYEE/ERP/c/XMLPUBLISHER.PSXPQRYVIEWER.GBL
Favorites
Main Menu
Reporting Tools
BI Publisher
Query Report Viewer
Home
Sign Out
Financials RPT
Help
OK
Cancel

Step	Action
10.	You must enter a *Beginning Date*, *Ending Date* and *GL Unit* at minimum to run the report. To focus your results, remove the '%' and add a *Department* number, *Project* number, *Empl ID*, etc. All fields must have a value or a '%' in order for the report to successfully run.
11.	For this exercise, the following parameters will be added: • **Project** – 122530011A • **Beginning Date** – 05/01/21 • **Ending Date** – 06/01/21 • **GL Unit** - LSUNO



Query Report Viewer
prd.psfs.lsuhsc.edu/psp/fsrpt/EMPLOYEE/ERP/c/XMLPUBLISHER.PSXPQRYVIEWER.GBL
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Favorites
Main Menu
Reporting Tools
BI Publisher
Query Report Viewer
Home
Sign Out
Financials RPT
Navigator
Search
Advanced Search
Last Search Results
Add To
Notification
NavBar
New Window | Help | Personalize Page
Query Report Viewer
Enter any information you have and click Search
*Search by
Report Name
Search
Advanced Search
Search Results
Report Definition
Help
OK
Cancel
11:01 AM
6/2/2021

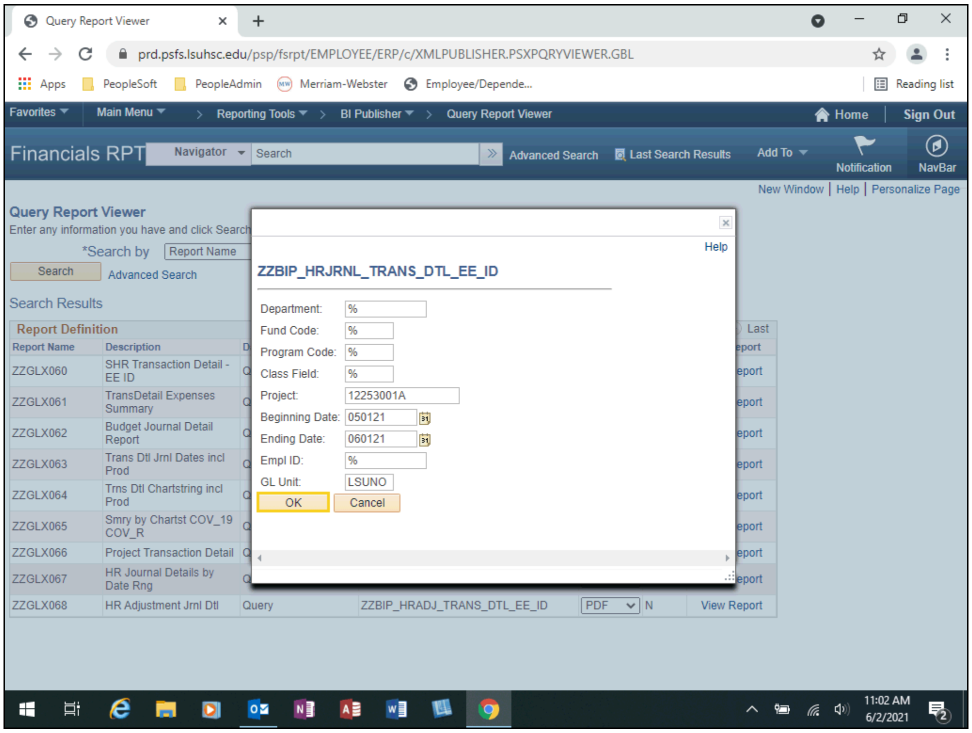
ZZBIP_HRJRNL_TRANS_DTL_EE_ID

Department: %
Fund Code: %
Program Code: %
Class Field: %
Project: %
Beginning Date:
Ending Date:
Empl ID: %
GL Unit:

Report Name	Description
ZZGLX060	SHR Transaction Detail - EE ID
ZZGLX061	TransDetail Expenses Summary
ZZGLX062	Budget Journal Detail Report
ZZGLX063	Trans Dtl Jrnl Dates incl Prod
ZZGLX064	Trns Dtl Chartstring incl Prod
ZZGLX065	Smry by Chartst COV_19 COV_R
ZZGLX066	Project Transaction Detail
ZZGLX067	HR Journal Details by Date Rng
ZZGLX068	HR Adjustment Jrnl Dtl

ZZGLX068 HR Adjustment Jrnl Dtl Query ZZBIP_HRADJ_TRANS_DTL_EE_ID PDF N View Report

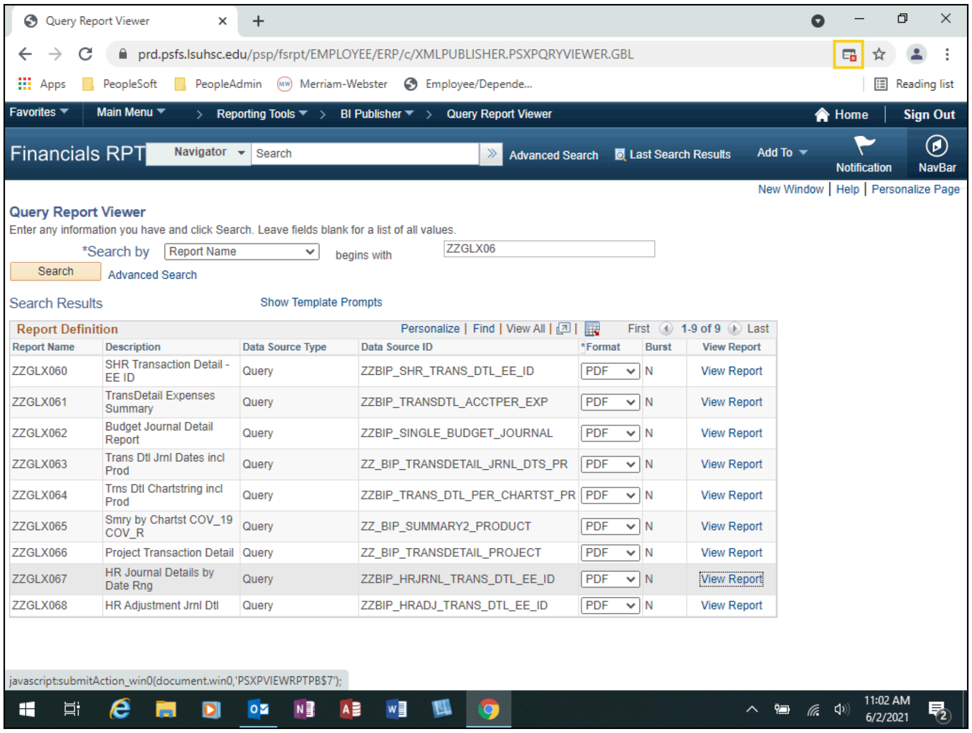
Step	Action
12.	Enter the desired information into the **Project:** field. Enter "**122530011A**".
13.	Enter the desired information into the **Beginning Date:** field. Enter "**050121**".
14.	Enter the desired information into the **Ending Date:** field. Enter "**060121**".
15.	Enter the desired information into the **GL Unit:** field. Enter "**LSUNO**".


Query Report Viewer
prd.psfs.lsuhsc.edu/psp/fsrpt/EMPLOYEE/ERP/c/XMLPUBLISHER.PSXPQRYVIEWER.GBL
Favorites
Main Menu
Reporting Tools
BI Publisher
Query Report Viewer
Home
Sign Out
Financials RPT
Navigator
Search
Advanced Search
Last Search Results
Add To
Notification
NavBar
Help
OK
Cancel

ZZBIP_HRJRNL_TRANS_DTL_EE_ID

Department: %
Fund Code: %
Program Code: %
Class Field: %
Project: 12253001A
Beginning Date: 050121
Ending Date: 060121
Empl ID: %
GL Unit: LSUNO

Step	Action
16.	Click the **OK** button. OK


Query Report Viewer
prd.psfs.lsuhsc.edu/psp/fsrpt/EMPLOYEE/ERP/c/XMLPUBLISHER.PSXPQRYVIEWER.GBL
Apps
PeopleSoft
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Employee/Depende...
Reading list
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Main Menu
Reporting Tools
BI Publisher
Query Report Viewer
Home
Sign Out
Financials RPT
Navigator
Search
Advanced Search
Last Search Results
Add To
Notification
NavBar
New Window | Help | Personalize Page
11:02 AM
6/2/2021

Query Report Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search by: Report Name — begins with: ZZGLX06

Search | Advanced Search

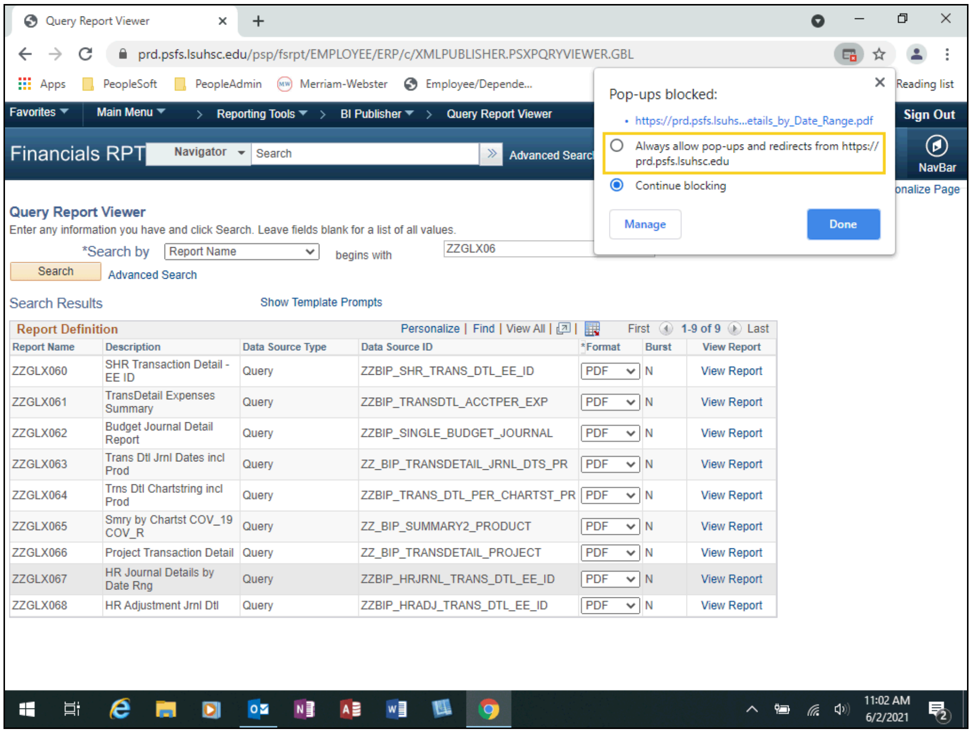
Search Results — Show Template Prompts

Report Definition — Personalize | Find | View All | First 1-9 of 9 Last

Report Name	Description	Data Source Type	Data Source ID	*Format	Burst	View Report
ZZGLX060	SHR Transaction Detail - EE ID	Query	ZZBIP_SHR_TRANS_DTL_EE_ID	PDF	N	View Report
ZZGLX061	TransDetail Expenses Summary	Query	ZZBIP_TRANSDTL_ACCTPER_EXP	PDF	N	View Report
ZZGLX062	Budget Journal Detail Report	Query	ZZBIP_SINGLE_BUDGET_JOURNAL	PDF	N	View Report
ZZGLX063	Trans Dtl Jrnl Dates incl Prod	Query	ZZ_BIP_TRANSDETAIL_JRNL_DTS_PR	PDF	N	View Report
ZZGLX064	Trns Dtl Chartstring incl Prod	Query	ZZBIP_TRANS_DTL_PER_CHARTST_PR	PDF	N	View Report
ZZGLX065	Smry by Chartst COV_19 COV_R	Query	ZZ_BIP_SUMMARY2_PRODUCT	PDF	N	View Report
ZZGLX066	Project Transaction Detail	Query	ZZ_BIP_TRANSDETAIL_PROJECT	PDF	N	View Report
ZZGLX067	HR Journal Details by Date Rng	Query	ZZBIP_HRJRNL_TRANS_DTL_EE_ID	PDF	N	View Report
ZZGLX068	HR Adjustment Jrnl Dtl	Query	ZZBIP_HRADJ_TRANS_DTL_EE_ID	PDF	N	View Report

```
javascript:submitAction_win0(document.win0,'PSXPVIEWRPTPB$7');
```

Step	Action
17.	If you are returned to the *Query Report Viewer* page without your results displaying, check your browser for a **Pop-up Blocker** message. Click the **Pop-up blocked** button.


Query Report Viewer
prd.psfs.lsuhsc.edu/psp/fsrpt/EMPLOYEE/ERP/c/XMLPUBLISHER.PSXPQRYVIEWER.GBL
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Favorites
Main Menu
Reporting Tools
BI Publisher
Query Report Viewer
Sign Out
Financials RPT
Navigator
Search
Advanced Search
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6/2/2021

Pop-ups blocked:

- https://prd.psfs.lsuhs...etails_by_Date_Range.pdf

○ Always allow pop-ups and redirects from https://prd.psfs.lsuhsc.edu

● Continue blocking

Manage | Done

Query Report Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search by: Report Name — begins with: ZZGLX06

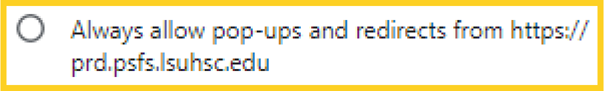
Search | Advanced Search

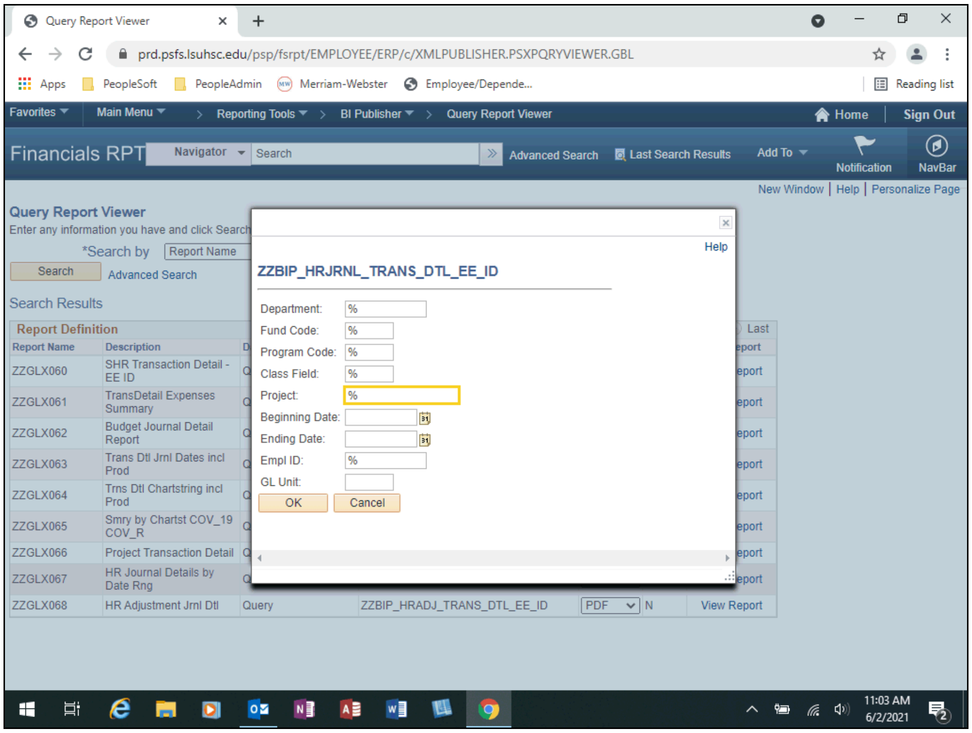
Search Results

Show Template Prompts

Report Definition — Personalize | Find | View All | First 1-9 of 9 Last

Report Name	Description	Data Source Type	Data Source ID	*Format	Burst	View Report
ZZGLX060	SHR Transaction Detail - EE ID	Query	ZZBIP_SHR_TRANS_DTL_EE_ID	PDF	N	View Report
ZZGLX061	TransDetail Expenses Summary	Query	ZZBIP_TRANSDTL_ACCTPER_EXP	PDF	N	View Report
ZZGLX062	Budget Journal Detail Report	Query	ZZBIP_SINGLE_BUDGET_JOURNAL	PDF	N	View Report
ZZGLX063	Trans Dtl Jrnl Dates incl Prod	Query	ZZ_BIP_TRANSDETAIL_JRNL_DTS_PR	PDF	N	View Report
ZZGLX064	Trns Dtl Chartstring incl Prod	Query	ZZBIP_TRANS_DTL_PER_CHARTST_PR	PDF	N	View Report
ZZGLX065	Smry by Chartst COV_19 COV_R	Query	ZZ_BIP_SUMMARY2_PRODUCT	PDF	N	View Report
ZZGLX066	Project Transaction Detail	Query	ZZ_BIP_TRANSDETAIL_PROJECT	PDF	N	View Report
ZZGLX067	HR Journal Details by Date Rng	Query	ZZBIP_HRJRNL_TRANS_DTL_EE_ID	PDF	N	View Report
ZZGLX068	HR Adjustment Jrnl Dtl	Query	ZZBIP_HRADJ_TRANS_DTL_EE_ID	PDF	N	View Report

Step	Action
18.	Select the option to allow for pop-ups. Click the **Always allow pop-ups and redirects from https://prd.psfs.lsuhsc.edu** option.  ○ Always allow pop-ups and redirects from https://prd.psfs.lsuhsc.edu
19.	Click the **Done** button.
20.	Users must start from the beginning and resubmit the report. Click in the **View Report** field. View Report


Query Report Viewer
prd.psfs.lsuhsc.edu/psp/fsrpt/EMPLOYEE/ERP/c/XMLPUBLISHER.PSXPQRYVIEWER.GBL
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Favorites
Main Menu
Reporting Tools
BI Publisher
Query Report Viewer
Home
Sign Out
Financials RPT
Navigator
Search
Advanced Search
Last Search Results
Add To
Notification
NavBar
New Window | Help | Personalize Page
Query Report Viewer
Enter any information you have and click Search
*Search by
Report Name
Search
Advanced Search
Search Results
Report Definition
Report Name
Description
ZZGLX060
SHR Transaction Detail - EE ID
ZZGLX061
TransDetail Expenses Summary
ZZGLX062
Budget Journal Detail Report
ZZGLX063
Trans Dtl Jrnl Dates incl Prod
ZZGLX064
Trns Dtl Chartstring incl Prod
ZZGLX065
Smry by Chartst COV_19 COV_R
ZZGLX066
Project Transaction Detail
ZZGLX067
HR Journal Details by Date Rng
ZZGLX068
HR Adjustment Jrnl Dtl
Query
ZZBIP_HRADJ_TRANS_DTL_EE_ID
PDF
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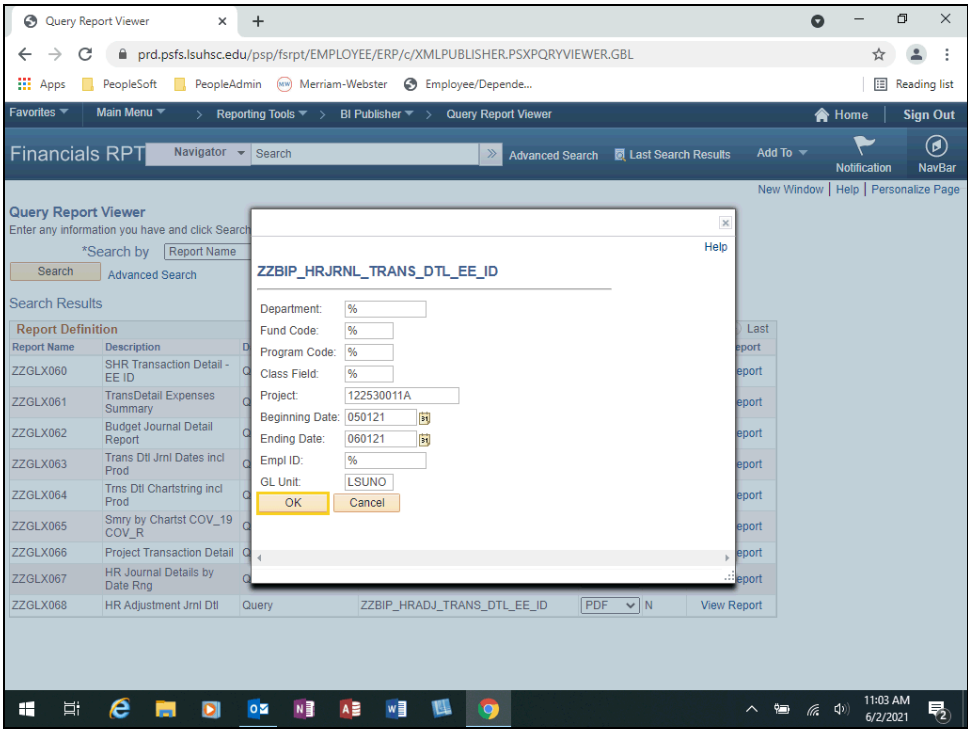
ZZBIP_HRJRNL_TRANS_DTL_EE_ID

Department: %
Fund Code: %
Program Code: %
Class Field: %
Project: %
Beginning Date:
Ending Date:
Empl ID: %
GL Unit:

OK Cancel

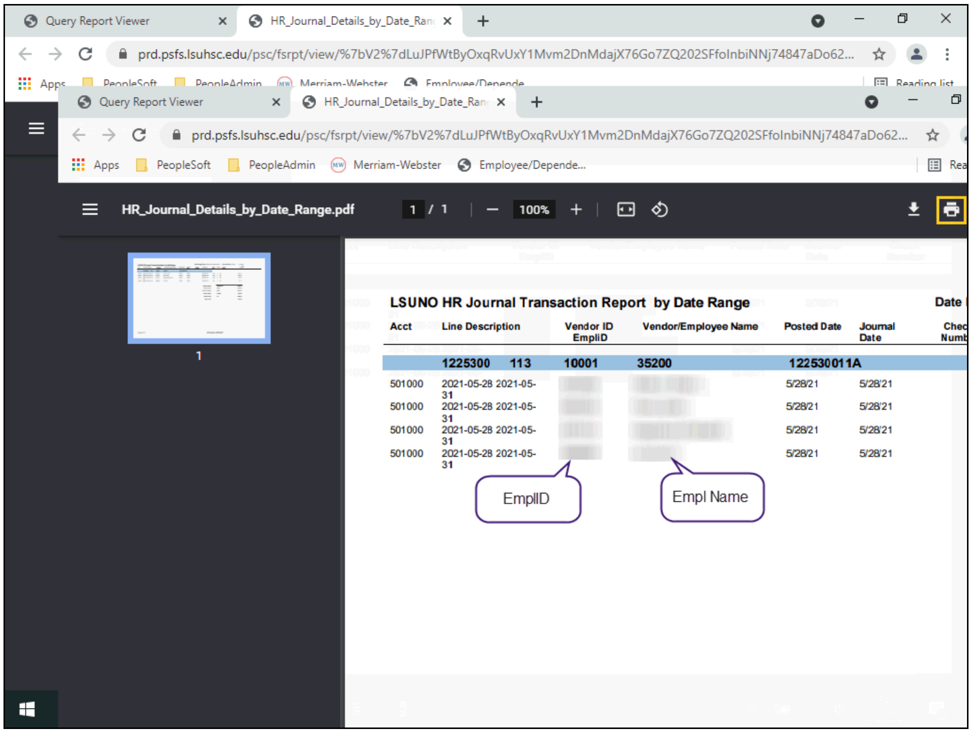
Step	Action
21.	Enter the desired information into the **Project:** field. Enter "**122530011A**".
22.	Enter the desired information into the **Beginning Date:** field. Enter "**050121**".
23.	Enter the desired information into the **Ending Date:** field. Enter "**060121**".
24.	Enter the desired information into the **GL Unit:** field. Enter "**LSUNO**".


Query Report Viewer
prd.psfs.lsuhsc.edu/psp/fsrpt/EMPLOYEE/ERP/c/XMLPUBLISHER.PSXPQRYVIEWER.GBL
Favorites
Main Menu
Reporting Tools
BI Publisher
Query Report Viewer
Home
Sign Out
Financials RPT
Navigator
Search
Advanced Search
Last Search Results
Add To
Notification
NavBar
Help
OK
Cancel

ZZBIP_HRJRNL_TRANS_DTL_EE_ID

Department: %
Fund Code: %
Program Code: %
Class Field: %
Project: 122530011A
Beginning Date: 050121
Ending Date: 060121
Empl ID: %
GL Unit: LSUNO

Step	Action
25.	Click the **OK** button. OK
26.	Your report displays. Use the *Zoom In* button to enlarge results. For this exercise, enlarge your view to 100%. Click the **Zoom In** button. +


Query Report Viewer
HR_Journal_Details_by_Date_Ran
prd.psfs.lsuhsc.edu/psc/fsrpt/view/%7bV2%7dLuJPfWtByOxqRvUxY1Mvm2DnMdajX76Go7ZQ202SFfolnbiNNj74847aDo62...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
HR_Journal_Details_by_Date_Range.pdf
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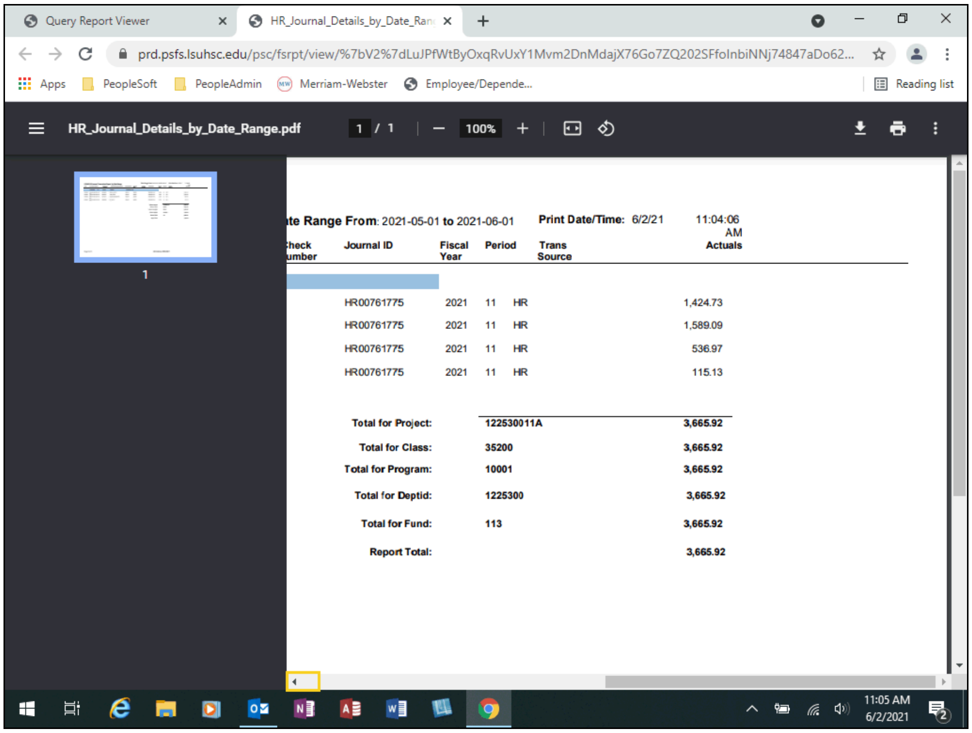
100%
1
EmplID
Empl Name

LSUNO HR Journal Transaction Report by Date Range Date

Acct	Line Description	Vendor ID EmplID	Vendor/Employee Name	Posted Date	Journal Date	Chec Numb
	1225300 113	**10001**	**35200**	**12253001 1A**		
501000	2021-05-28 2021-05-31	[redacted]	[redacted]	5/28/21	5/28/21	
501000	2021-05-28 2021-05-31	[redacted]	[redacted]	5/28/21	5/28/21	
501000	2021-05-28 2021-05-31	[redacted]	[redacted]	5/28/21	5/28/21	
501000	2021-05-28 2021-05-31	[redacted]	[redacted]	5/28/21	5/28/21	

Step	Action
27.	Click the **Right** scrollbar to view additional information.


Query Report Viewer
HR_Journal_Details_by_Date_Ran
prd.psfs.lsuhsc.edu/psc/fsrpt/view/%7bV2%7dLuJPfWtByOxqRvUxY1Mvm2DnMdajX76Go7ZQ202SFfoInbiNNj74847aDo62...
Apps
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Reading list
HR_Journal_Details_by_Date_Range.pdf
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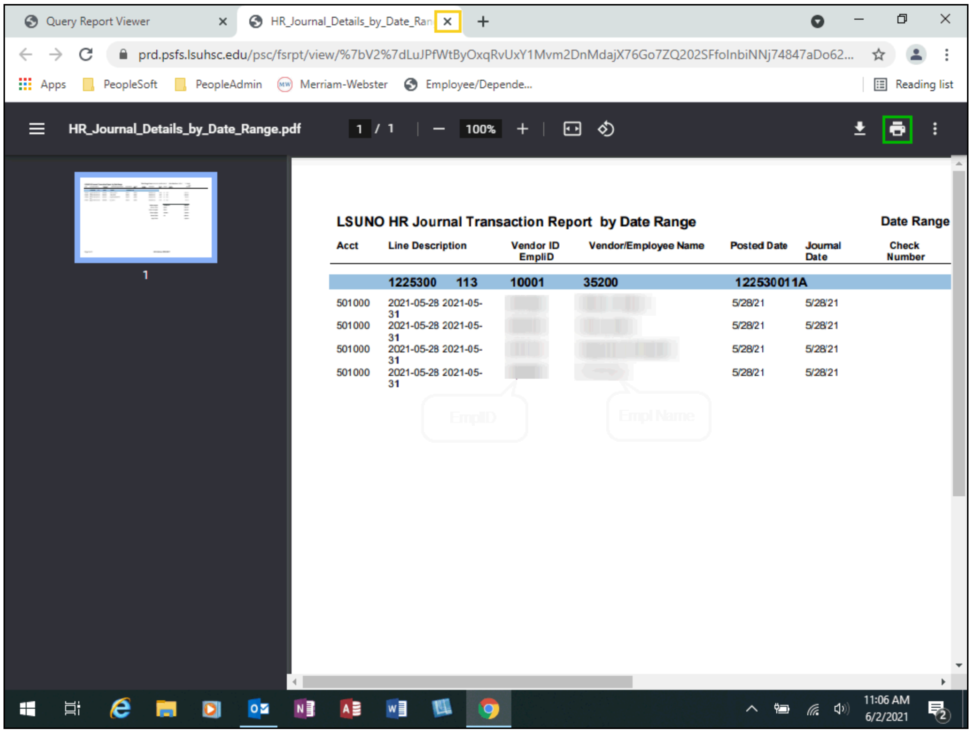
6/2/2021

te Range From: 2021-05-01 to 2021-06-01 Print Date/Time: 6/2/21 11:04:06 AM

heck umber	Journal ID	Fiscal Year	Period	Trans Source	Actuals
	HR00761775	2021	11	HR	1,424.73
	HR00761775	2021	11	HR	1,589.09
	HR00761775	2021	11	HR	536.97
	HR00761775	2021	11	HR	115.13

Total for Project:	122530011A	3,665.92
Total for Class:	35200	3,665.92
Total for Program:	10001	3,665.92
Total for Deptid:	1225300	3,665.92
Total for Fund:	113	3,665.92
Report Total:		3,665.92

Step	Action
28.	Click the **Left** scrollbar.


Query Report Viewer
HR_Journal_Details_by_Date_Ran
prd.psfs.lsuhsc.edu/psc/fsrpt/view/%7bV2%7dLuJPfWtByOxqRvUxY1Mvm2DnMdajX76Go7ZQ202SFfoInbiNNj74847aDo62...
Apps
PeopleSoft
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Reading list
HR_Journal_Details_by_Date_Range.pdf
1 / 1
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EmplID
Empl Name
11:06 AM
6/2/2021

LSUNO HR Journal Transaction Report by Date Range **Date Range**

Acct	Line Description	Vendor ID EmplID	Vendor/Employee Name	Posted Date	Journal Date	Check Number
	1225300 113	**10001**	**35200**	**122530011A**		
501000	2021-05-28 2021-05-31	[redacted]	[redacted]	5/28/21	5/28/21	
501000	2021-05-28 2021-05-31	[redacted]	[redacted]	5/28/21	5/28/21	
501000	2021-05-28 2021-05-31	[redacted]	[redacted]	5/28/21	5/28/21	
501000	2021-05-28 2021-05-31	[redacted]	[redacted]	5/28/21	5/28/21	

Step	Action
29.	Users can print the report by clicking the **Print** button on the page toolbar. Click the **Close HR_Journal_Details_by_Date_Range** tab. ✕
30.	Click the **Home** button. Home
31.	This completes ***Run BI Publisher HR Journal Details by Date Rng Report***. **End of Procedure.**

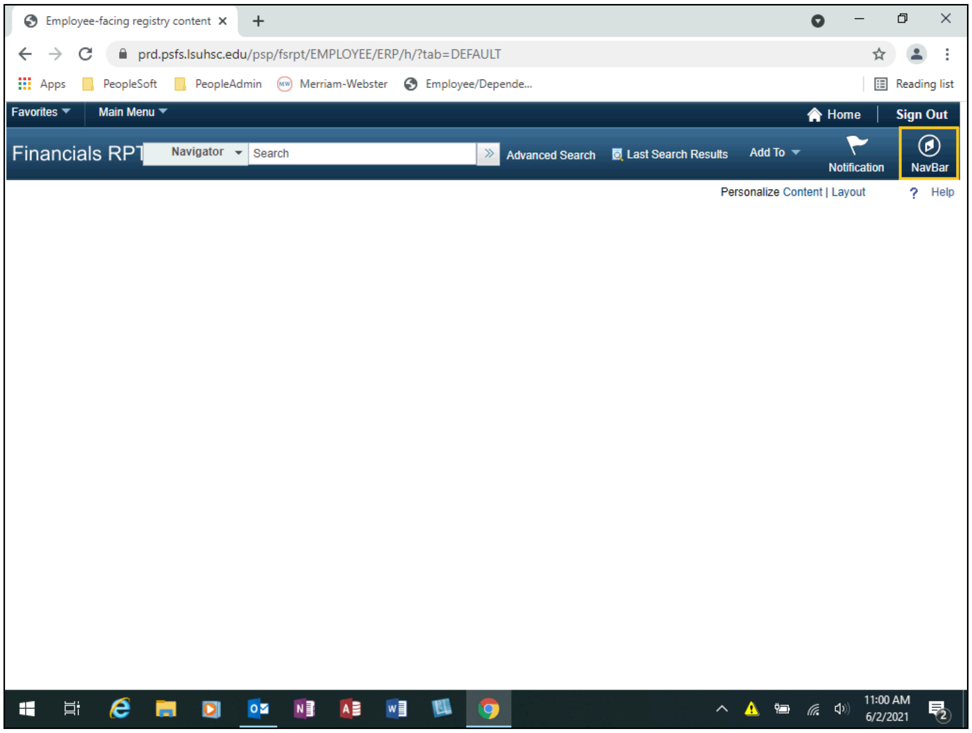
Run BI Publisher HR Adjustment Jrnl Dtl Report in FIN RPT

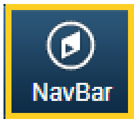
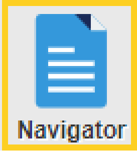
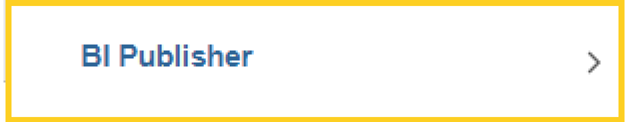
Procedure

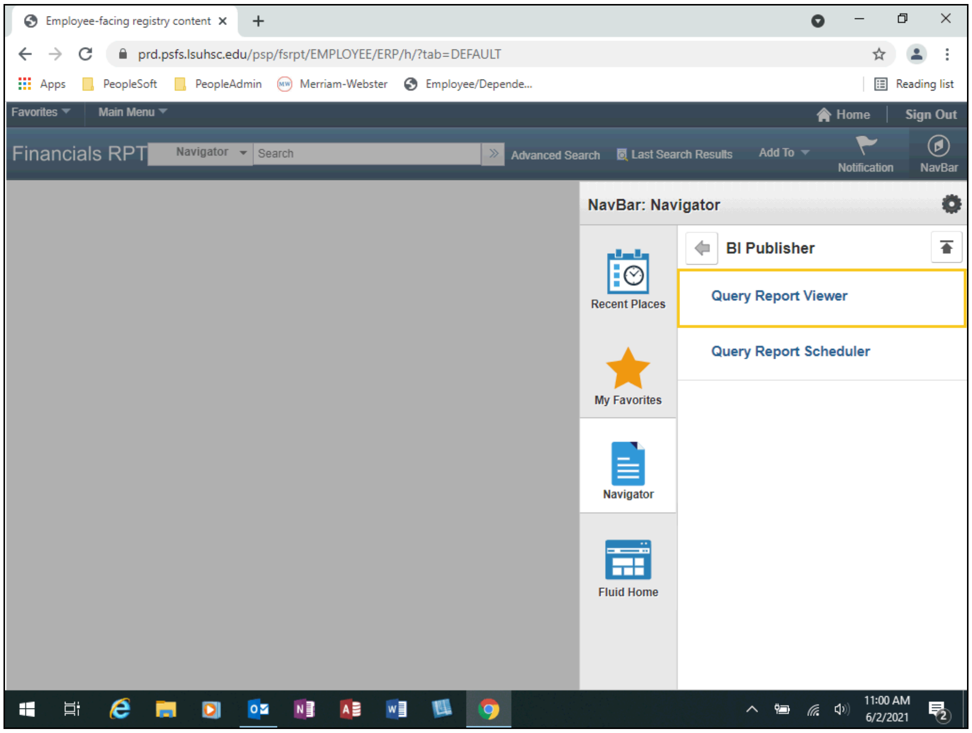
In this topic you will learn how to **Run BI Publisher HR Adjustment Jrnl Dtl Report in FIN RPT**.

NOTE: The FIN Reports (RPT) database is one day behind Production.

Step	Action
1.	Users can check the FIN Reports (RPT) system to see if their Change in Source of Funds (CSOF) request has been posted to the ledger. Two BI Publisher reports have been written to obtain Journal Details regarding CSOF requests: • **ZZGLX067** – HR Journal Details by Date Rng • **ZZGLX068** – HR Adjustment Jrnl Dtl ***In this exercise, you will run the HR Adjustment Jrnl Dtl Report.***


Employee-facing registry content
prd.psfs.lsuhsc.edu/psp/fsrpt/EMPLOYEE/ERP/h/?tab=DEFAULT
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Favorites
Main Menu
Home
Sign Out
Financials RPT
Navigator
Search
Advanced Search
Last Search Results
Add To
Notification
NavBar
Personalize Content | Layout
Help
11:00 AM
6/2/2021

Step	Action
2.	Click the **NavBar** button. 
3.	Click the **Navigator** menu. 
4.	Click the **Reporting Tools** menu. Reporting Tools
5.	Click the **BI Publisher** menu.  BI Publisher


Employee-facing registry content
prd.psfs.lsuhsc.edu/psp/fsrpt/EMPLOYEE/ERP/h/?tab=DEFAULT
Apps
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PeopleAdmin
Merriam-Webster
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Reading list
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Main Menu
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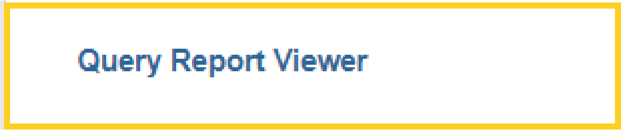
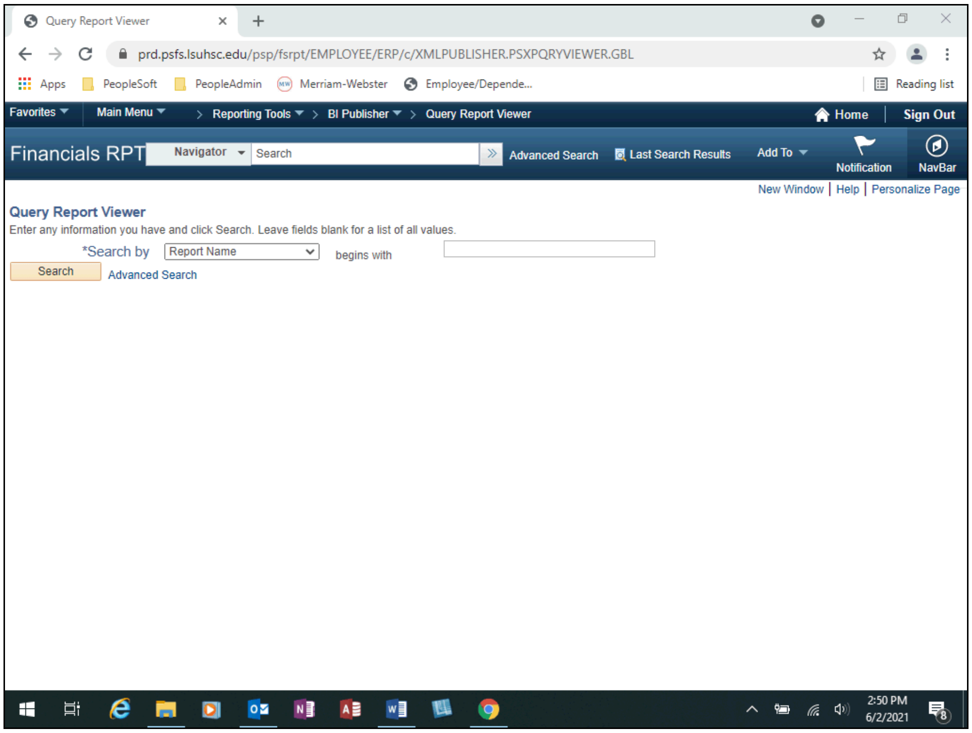
Sign Out
Financials RPT
Navigator
Search
Advanced Search
Last Search Results
Add To
Notification
NavBar
NavBar: Navigator
Recent Places
My Favorites
Navigator
Fluid Home
BI Publisher
Query Report Viewer
Query Report Scheduler
11:00 AM
6/2/2021

Step	Action
6.	Click the **Query Report Viewer** list item.  Query Report Viewer


Query Report Viewer
prd.psfs.lsuhsc.edu/psp/fsrpt/EMPLOYEE/ERP/c/XMLPUBLISHER.PSXPQRYVIEWER.GBL
Apps
PeopleSoft
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Reading list
Favorites
Main Menu
Reporting Tools
BI Publisher
Query Report Viewer
Home
Sign Out
Financials RPT
Navigator
Search
Advanced Search
Last Search Results
Add To
Notification
NavBar
New Window
Help
Personalize Page
2:50 PM
6/2/2021

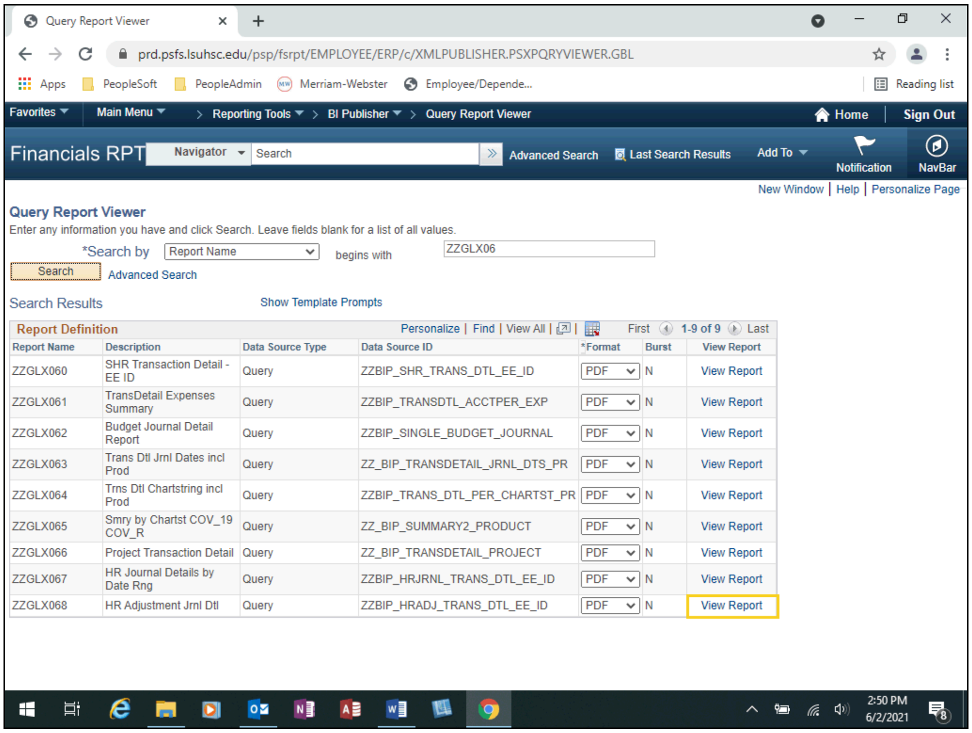
Query Report Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search by Report Name begins with

Search Advanced Search

Step	Action
7.	Enter the desired information into the **Search by** field. Enter "**ZZGLX06**".
8.	Click the **Search** button. Search


Query Report Viewer
prd.psfs.lsuhsc.edu/psp/fsrpt/EMPLOYEE/ERP/c/XMLPUBLISHER.PSXPQRYVIEWER.GBL
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
Favorites
Main Menu
Reporting Tools
BI Publisher
Query Report Viewer
Home
Sign Out
Financials RPT
Navigator
Search
Advanced Search
Last Search Results
Add To
Notification
NavBar
New Window | Help | Personalize Page
2:50 PM
6/2/2021

Query Report Viewer

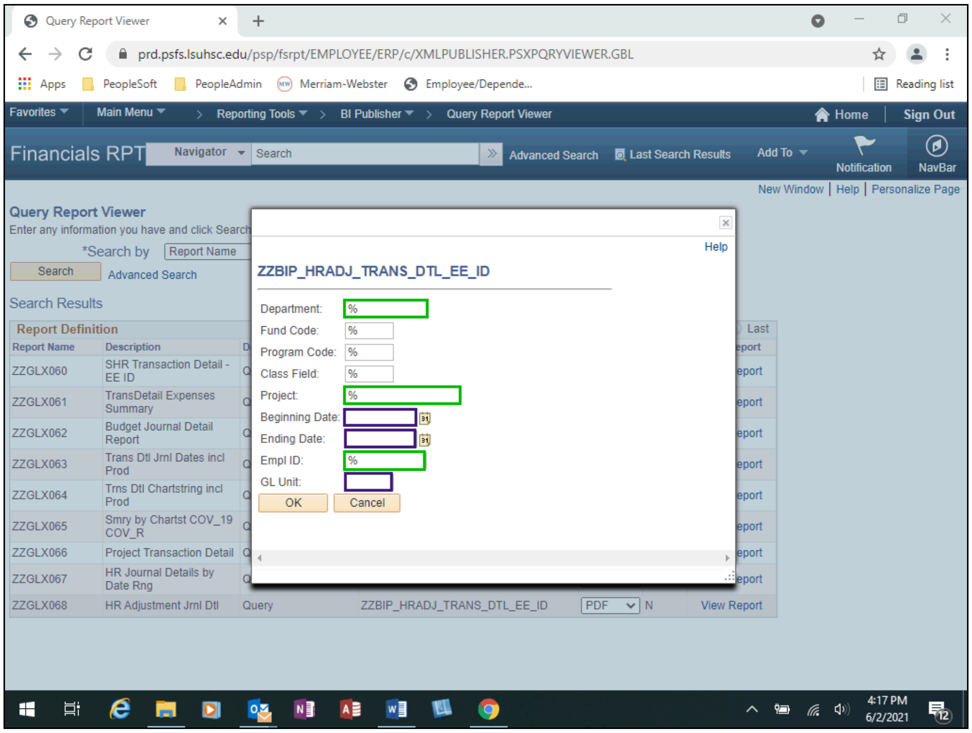
Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search by: Report Name begins with ZZGLX06

Search
Advanced Search
Search Results
Show Template Prompts
Report Definition
Personalize | Find | View All |
First 1-9 of 9 Last

Report Name	Description	Data Source Type	Data Source ID	*Format	Burst	View Report
ZZGLX060	SHR Transaction Detail - EE ID	Query	ZZBIP_SHR_TRANS_DTL_EE_ID	PDF	N	View Report
ZZGLX061	TransDetail Expenses Summary	Query	ZZBIP_TRANSDTL_ACCTPER_EXP	PDF	N	View Report
ZZGLX062	Budget Journal Detail Report	Query	ZZBIP_SINGLE_BUDGET_JOURNAL	PDF	N	View Report
ZZGLX063	Trans Dtl Jrnl Dates incl Prod	Query	ZZ_BIP_TRANSDETAIL_JRNL_DTS_PR	PDF	N	View Report
ZZGLX064	Trns Dtl Chartstring incl Prod	Query	ZZBIP_TRANS_DTL_PER_CHARTST_PR	PDF	N	View Report
ZZGLX065	Smry by Chartst COV_19 COV_R	Query	ZZ_BIP_SUMMARY2_PRODUCT	PDF	N	View Report
ZZGLX066	Project Transaction Detail	Query	ZZ_BIP_TRANSDETAIL_PROJECT	PDF	N	View Report
ZZGLX067	HR Journal Details by Date Rng	Query	ZZBIP_HRJRNL_TRANS_DTL_EE_ID	PDF	N	View Report
ZZGLX068	HR Adjustment Jrnl Dtl	Query	ZZBIP_HRADJ_TRANS_DTL_EE_ID	PDF	N	View Report

Step	Action
9.	Select the *ZZGLX068* report. Click the **View Report** link.


Query Report Viewer
prd.psfs.lsuhsc.edu/psp/fsrpt/EMPLOYEE/ERP/c/XMLPUBLISHER.PSXPQRYVIEWER.GBL
Favorites
Main Menu
Reporting Tools
BI Publisher
Query Report Viewer
Home
Sign Out
Financials RPT
Navigator
Search
Advanced Search
Last Search Results
Add To
Notification
NavBar
New Window | Help | Personalize Page
Query Report Viewer
Enter any information you have and click Search
*Search by
Report Name
Search
Advanced Search
Search Results
Report Definition
Help
OK
Cancel

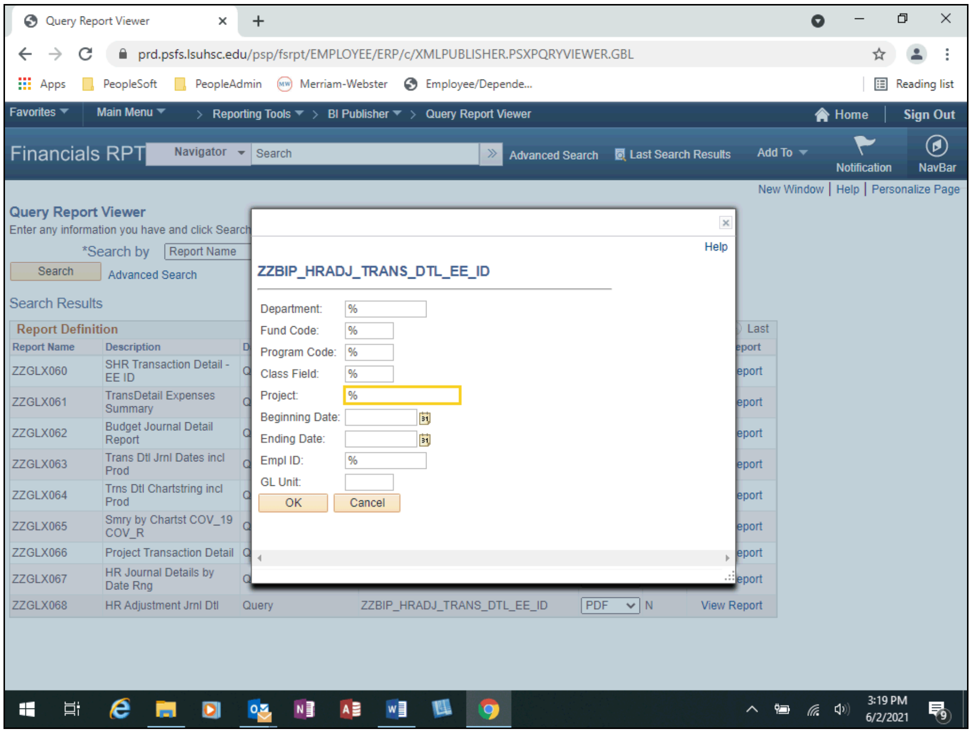
ZZBIP_HRADJ_TRANS_DTL_EE_ID

Department: %
Fund Code: %
Program Code: %
Class Field: %
Project: %
Beginning Date:
Ending Date:
Empl ID: %
GL Unit:

Report Name	Description
ZZGLX060	SHR Transaction Detail - EE ID
ZZGLX061	TransDetail Expenses Summary
ZZGLX062	Budget Journal Detail Report
ZZGLX063	Trans Dtl Jrnl Dates incl Prod
ZZGLX064	Trns Dtl Chartstring incl Prod
ZZGLX065	Smry by Chartst COV_19 COV_R
ZZGLX066	Project Transaction Detail
ZZGLX067	HR Journal Details by Date Rng
ZZGLX068	HR Adjustment Jrnl Dtl

ZZGLX068 HR Adjustment Jrnl Dtl Query ZZBIP_HRADJ_TRANS_DTL_EE_ID PDF N View Report

Step	Action
10.	You must enter a *Beginning Date*, *Ending Date* and *GL Unit* at minimum to run the report. To focus your results, remove the '%' and add a *Department* number, *Project* number, *EmplID*, etc. All fields must have a value or a '%' in order for the report to successfully run.
11.	For this exercise, the following parameters will be added: • **Project** – 158050024A • **Beginning Date** – 04/01/21 • **Ending Date** – 06/01/21 • **GL Unit** - LSUNO


Query Report Viewer
prd.psfs.lsuhsc.edu/psp/fsrpt/EMPLOYEE/ERP/c/XMLPUBLISHER.PSXPQRYVIEWER.GBL
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Favorites
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Reporting Tools
BI Publisher
Query Report Viewer
Home
Sign Out
Financials RPT
Navigator
Search
Advanced Search
Last Search Results
Add To
Notification
NavBar
New Window | Help | Personalize Page
Search
Help
OK
Cancel
3:19 PM
6/2/2021

Query Report Viewer

Enter any information you have and click Search

*Search by: Report Name

Advanced Search

Search Results

Report Definition

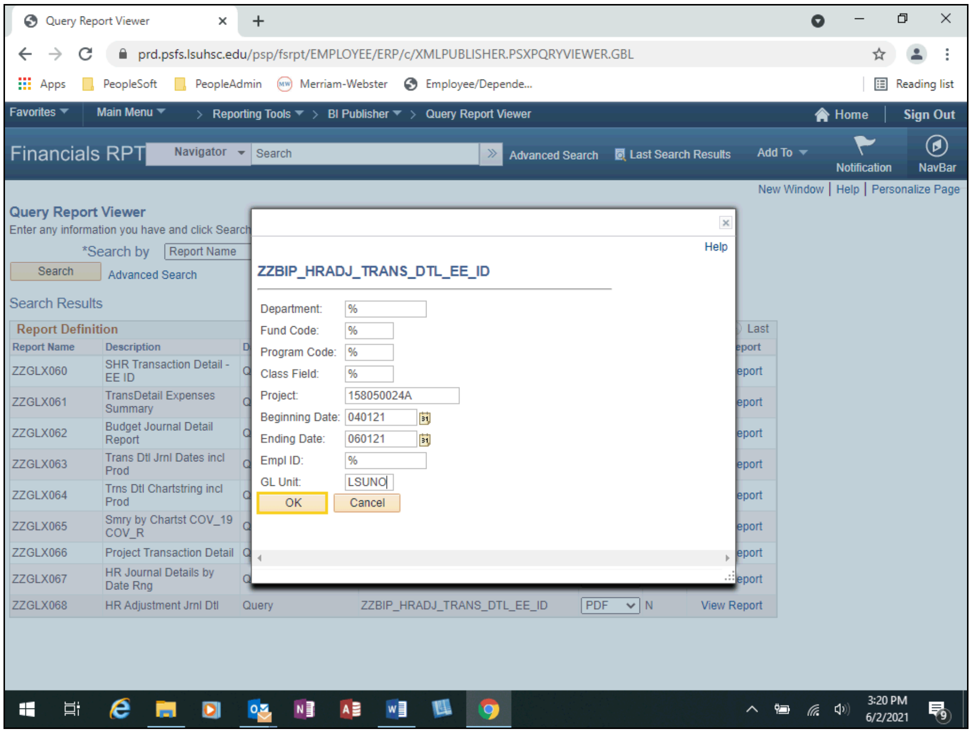
Report Name	Description
ZZGLX060	SHR Transaction Detail - EE ID
ZZGLX061	TransDetail Expenses Summary
ZZGLX062	Budget Journal Detail Report
ZZGLX063	Trans Dtl Jrnl Dates incl Prod
ZZGLX064	Trns Dtl Chartstring incl Prod
ZZGLX065	Smry by Chartst COV_19 COV_R
ZZGLX066	Project Transaction Detail
ZZGLX067	HR Journal Details by Date Rng
ZZGLX068	HR Adjustment Jrnl Dtl

ZZGLX068: Query, ZZBIP_HRADJ_TRANS_DTL_EE_ID, PDF, N, View Report

ZZBIP_HRADJ_TRANS_DTL_EE_ID

Department: %
Fund Code: %
Program Code: %
Class Field: %
Project: %
Beginning Date:
Ending Date:
Empl ID: %
GL Unit:

Step	Action
12.	The *Department* number or *EmplID* could be used instead of Project as a parameter. Enter the desired information into the **Project:** field. Enter "**158050024A**".
13.	Enter the desired information into the **Beginning Date:** field. Enter "**040121**".
14.	Enter the desired information into the **Ending Date:** field. Enter "**060121**".
15.	Enter the desired information into the **GL Unit:** field. Enter "**LSUNO**".


Query Report Viewer
prd.psfs.lsuhsc.edu/psp/fsrpt/EMPLOYEE/ERP/c/XMLPUBLISHER.PSXPQRYVIEWER.GBL
Favorites
Main Menu
Reporting Tools
BI Publisher
Query Report Viewer
Home
Sign Out
Financials RPT
Navigator
Search
Advanced Search
Last Search Results
Add To
Notification
NavBar
New Window | Help | Personalize Page
Query Report Viewer
Enter any information you have and click Search
*Search by
Report Name
Search
Advanced Search
Search Results
Help
OK
Cancel

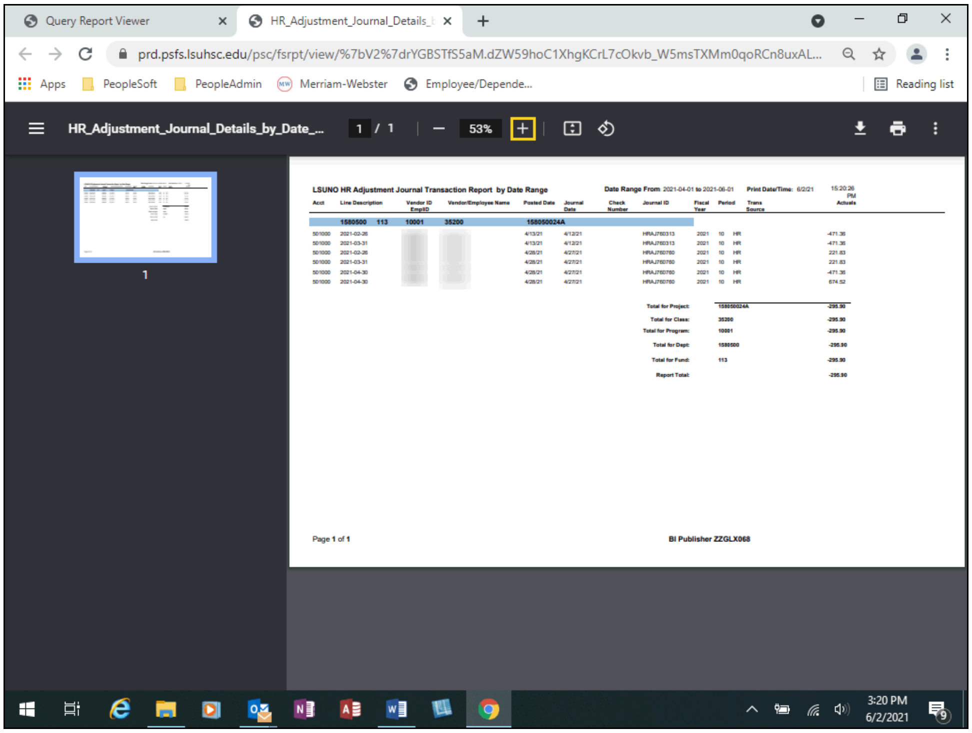
ZZBIP_HRADJ_TRANS_DTL_EE_ID

Department: %
Fund Code: %
Program Code: %
Class Field: %
Project: 158050024A
Beginning Date: 040121
Ending Date: 060121
Empl ID: %
GL Unit: LSUNO

Report Name	Description
ZZGLX060	SHR Transaction Detail - EE ID
ZZGLX061	TransDetail Expenses Summary
ZZGLX062	Budget Journal Detail Report
ZZGLX063	Trans Dtl Jrnl Dates incl Prod
ZZGLX064	Trns Dtl Chartstring incl Prod
ZZGLX065	Smry by Chartst COV_19 COV_R
ZZGLX066	Project Transaction Detail
ZZGLX067	HR Journal Details by Date Rng
ZZGLX068	HR Adjustment Jrnl Dtl

ZZGLX068 HR Adjustment Jrnl Dtl Query ZZBIP_HRADJ_TRANS_DTL_EE_ID PDF N View Report

Step	Action
16.	Click the **OK** button. OK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prd.psfs.lsuhsc.edu/psc/fsrpt/view/%7bV2%7drYGBSTfS5aM.dZW59hoC1XhgKCrL7cOkvb_W5msTXMm0qoRCn8uxAL...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
HR_Adjustment_Journal_Details_by_Date_...
1 / 1
53%
1
3:20 PM
6/2/2021

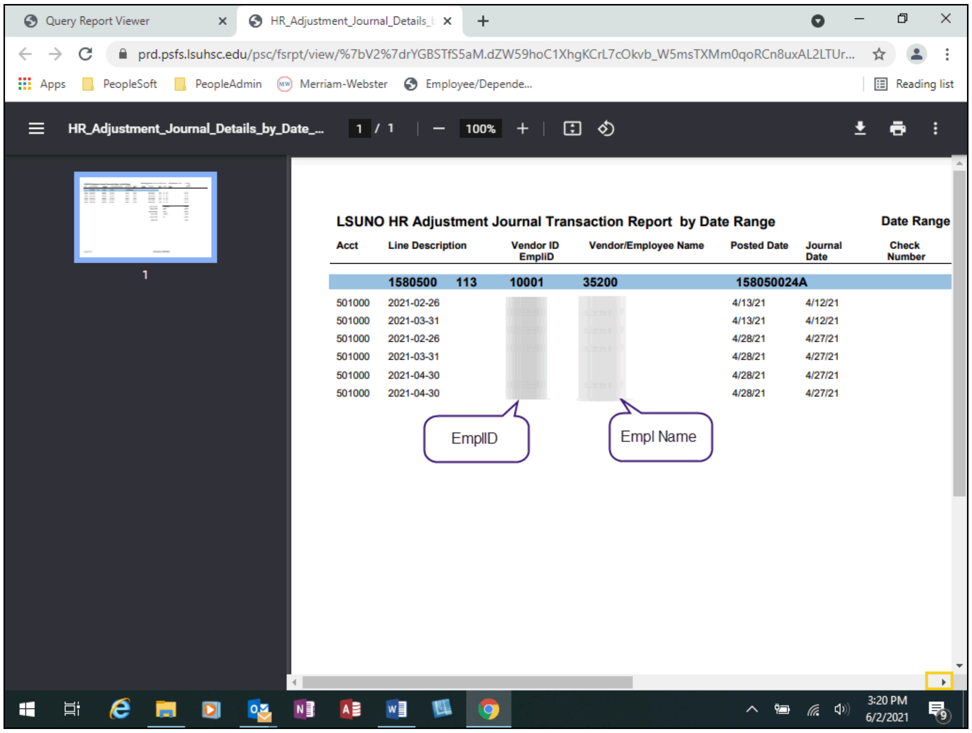
LSUNO HR Adjustment Journal Transaction Report by Date Range Date Range From: 2021-04-01 to 2021-06-01 Print Date/Time: 6/2/21 15:20:26 PM

Acct	Line Description	Vendor ID EmplID	Vendor/Employee Name	Posted Date	Journal Date	Check Number	Journal ID	Fiscal Year	Period	Trans Source	Actuals
	1580500 113	10001	35200	158050024A							
501000	2021-02-26	[redacted]	[redacted]	4/13/21	4/12/21		HRAJ760313	2021	10	HR	-471.36
501000	2021-03-31	[redacted]	[redacted]	4/13/21	4/12/21		HRAJ760313	2021	10	HR	-471.36
501000	2021-02-26	[redacted]	[redacted]	4/28/21	4/27/21		HRAJ760760	2021	10	HR	221.83
501000	2021-03-31	[redacted]	[redacted]	4/28/21	4/27/21		HRAJ760760	2021	10	HR	221.83
501000	2021-04-30	[redacted]	[redacted]	4/28/21	4/27/21		HRAJ760760	2021	10	HR	-471.36
501000	2021-04-30	[redacted]	[redacted]	4/28/21	4/27/21		HRAJ760760	2021	10	HR	674.52

Total for Project:	158050024A	-295.90
Total for Class:	35200	-295.90
Total for Program:	10001	-295.90
Total for Dept:	1580500	-295.90
Total for Fund:	113	-295.90
Report Total:		-295.90

Page 1 of 1 BI Publisher ZZGLX068

Step	Action
17.	Your report displays. Use the *Zoom In* button to enlarge results. For this exercise, enlarge your view to 100%. Click the **Zoom In** button.


Query Report Viewer
HR_Adjustment_Journal_Details_
prd.psfs.lsuhsc.edu/psc/fsrpt/view/%7bV2%7drYGBSTfS5aM.dZW59hoC1XhgKCrL7cOkvb_W5msTXMm0qoRCn8uxAL2LTUr...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
HR_Adjustment_Journal_Details_by_Date_...
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100%
1
3:20 PM
6/2/2021

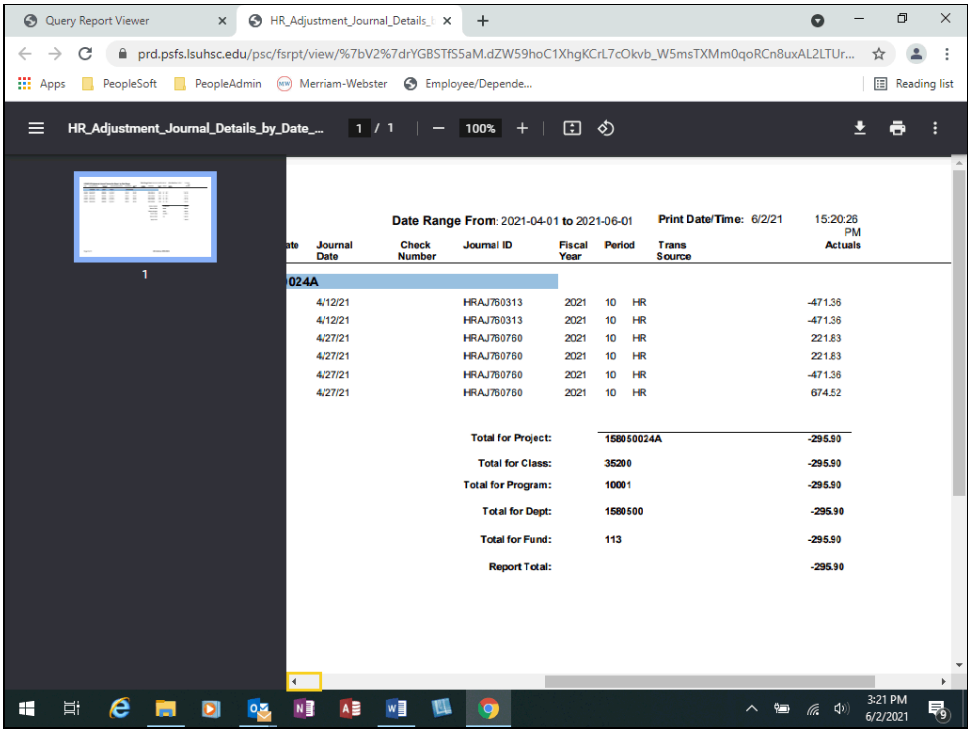
LSUNO HR Adjustment Journal Transaction Report by Date Range **Date Range**

Acct	Line Description	Vendor ID EmplID	Vendor/Employee Name	Posted Date	Journal Date	Check Number
	1580500 113	**10001**	**35200**	**158050024A**		
501000	2021-02-26	[redacted]	[redacted]	4/13/21	4/12/21	
501000	2021-03-31	[redacted]	[redacted]	4/13/21	4/12/21	
501000	2021-02-26	[redacted]	[redacted]	4/28/21	4/27/21	
501000	2021-03-31	[redacted]	[redacted]	4/28/21	4/27/21	
501000	2021-04-30	[redacted]	[redacted]	4/28/21	4/27/21	
501000	2021-04-30	[redacted]	[redacted]	4/28/21	4/27/21	

EmplID

Empl Name

Step	Action
18.	Click the **Right** scrollbar to view additional information.


Query Report Viewer
HR_Adjustment_Journal_Details_
prd.psfs.lsuhsc.edu/psc/fsrpt/view/%7bV2%7drYGBSTfS5aM.dZW59hoC1XhgKCrL7cOkvb_W5msTXMm0qoRCn8uxAL2LTUr...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
HR_Adjustment_Journal_Details_by_Date_...
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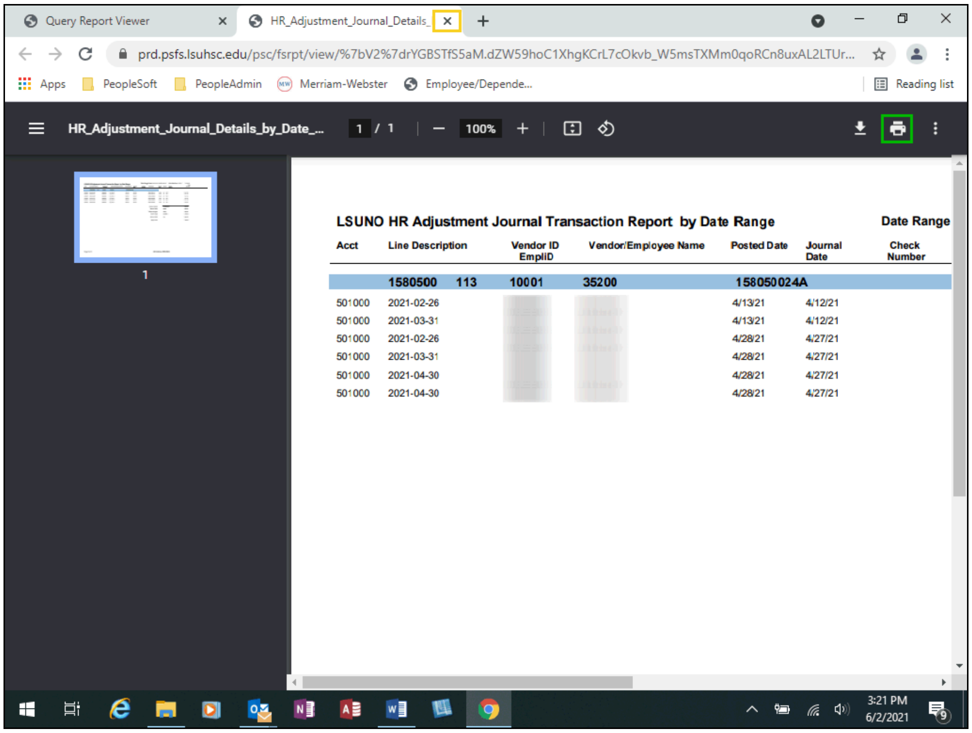
6/2/2021

Date Range From: 2021-04-01 **to** 2021-06-01 **Print Date/Time:** 6/2/21 15:20:26 PM

ate	Journal Date	Check Number	Journal ID	Fiscal Year	Period	Trans Source	Actuals
024A							
	4/12/21		HRAJ760313	2021	10	HR	-471.36
	4/12/21		HRAJ760313	2021	10	HR	-471.36
	4/27/21		HRAJ760760	2021	10	HR	221.83
	4/27/21		HRAJ760760	2021	10	HR	221.83
	4/27/21		HRAJ760760	2021	10	HR	-471.36
	4/27/21		HRAJ760760	2021	10	HR	674.52

Total for Project:	**158050024A**	**-295.90**
Total for Class:	**35200**	**-295.90**
Total for Program:	**10001**	**-295.90**
Total for Dept:	**1580500**	**-295.90**
Total for Fund:	**113**	**-295.90**
Report Total:		**-295.90**

Step	Action
19.	Click the **Left** scrollbar.


Query Report Viewer
HR_Adjustment_Journal_Details_
prd.psfs.lsuhsc.edu/psc/fsrpt/view/%7bV2%7drYGBSTfS5aM.dZW59hoC1XhgKCrL7cOkvb_W5msTXMm0qoRCn8uxAL2LTUr...
Apps
PeopleSoft
PeopleAdmin
Merriam-Webster
Employee/Depende...
Reading list
HR_Adjustment_Journal_Details_by_Date_...
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6/2/2021

LSUNO HR Adjustment Journal Transaction Report by Date Range

Date Range

Acct	Line Description	Vendor ID EmplID	Vendor/Employee Name	Posted Date	Journal Date	Check Number
	1580500 113	10001	35200	158050024A		
501000	2021-02-26	[redacted]	[redacted]	4/13/21	4/12/21	
501000	2021-03-31	[redacted]	[redacted]	4/13/21	4/12/21	
501000	2021-02-26	[redacted]	[redacted]	4/28/21	4/27/21	
501000	2021-03-31	[redacted]	[redacted]	4/28/21	4/27/21	
501000	2021-04-30	[redacted]	[redacted]	4/28/21	4/27/21	
501000	2021-04-30	[redacted]	[redacted]	4/28/21	4/27/21	

Step	Action
20.	Users can print the report by clicking the **Print** button on the page toolbar. Click the **Close HR_Adjustment_Journal_Details** tab. ✕
21.	This completes ***Run BI Publisher HR Adjustment Jrnl Dtl Report in FIN RPT***. **End of Procedure.**